MetaSolv OMS™ 2.8

Web Client User Guide

Second Edition
September 2005

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Introduction

This chapter offers overview information and describes the basic functions of the Order Management System (OMS) Web Client. The sections included in this chapter are:

- Overview
- OMS Web Client functionality

Overview

Order Management System (OMS) is a flexible and scalable system that allows service providers to improve service delivery times and reduce operational costs by controlling the network and customer service order provisioning processes.

OMS resides in the back office. Customer service orders are typically received from one or more front-office services such as a CRM system. With OMS, you can define both the process and the data requirements necessary to fulfill an order. OMS manages the life cycle associated with the order, including the management of information flow between OMS and peer Operating Support System (OSS) applications. The following diagram provides an overview of the OMS functional architecture.

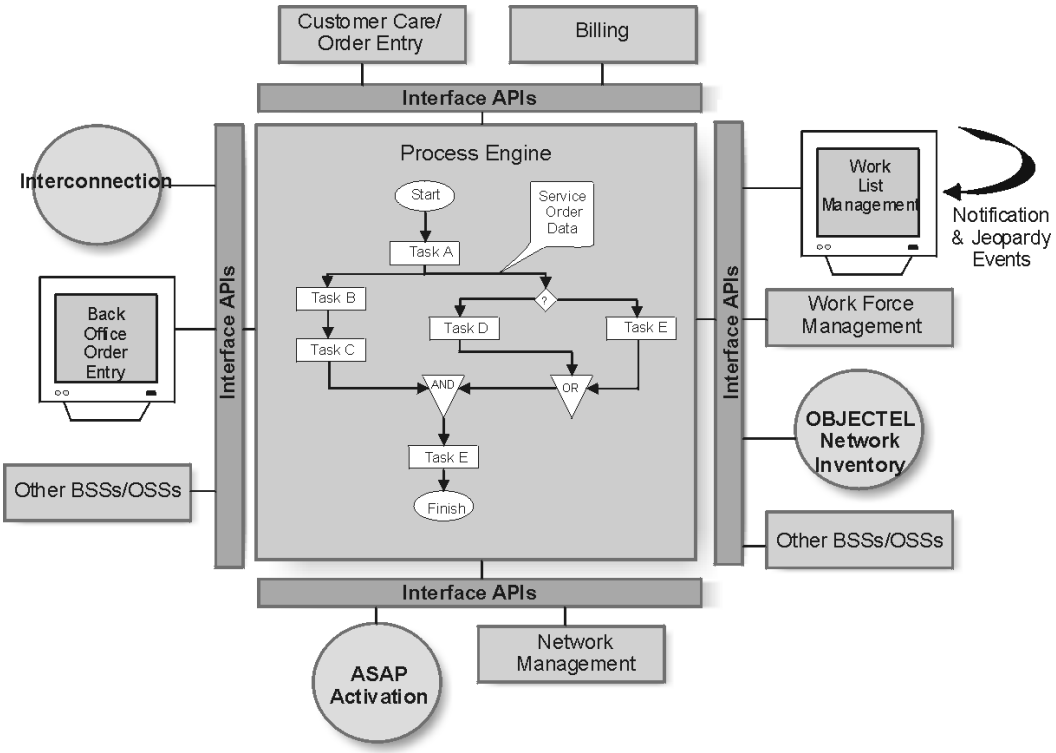


Figure 1: OMS Functional Architecture

An order is a set of data elements used to express a request for a service. Each data element is made up of a field identified by a name and containing a value. These fields are arranged in a hierarchical format to indicate the relationships to data element. The set of data and its hierarchy together are called the order template.

Processes

A *process* is a sequence of tasks that are executed consecutively or concurrently to fulfill an order or part of an order. Processes have a single entry point and one or more exit points.

Orders can be created in OMS by any external order entry system through the OMS API or can be manually created in OMS through the built-in-back-office order entry facility.

After an order is entered into OMS, it is submitted to a provisioning process, where it is decomposed into sequences of tasks that must be performed to deliver the order. Any number of processes can be defined in OMS, consisting of any number or combination of manual and automated tasks.

There are two types of processes, standard and workstream. In a standard process, OMS returns you to the worklist after it completes each task, where you select, then edit and execute

the next task in the process. In a workstream process, however, OMS takes you directly to the next task, without first returning you to the worklist.

Tasks

A *task* is a step in a process. Typically, tasks are activities on an order and can be manual or automated, and can be part of either a standard or a workstream process.

Orders that are in progress (pending completion) can be located at one or more tasks simultaneously. This means that one or more end-users can be working on a single order simultaneously, though only one end-user can work on a specific task for that order at any one time.

Manual tasks are tasks that you perform using the OMS Web Client. As an order moves through a process, it arrives at tasks based on the way the process is defined. When an order arrives at a task, it is added to the worklist of the workgroup(s) that are to work on that task. Users belonging to those workgroups can see the new task in their worklist when they refresh. Users can select an order from their worklist to view the order and perform any work associated with that task.

Automated tasks are implemented through custom-developed applications that subscribe to OMS services through a standard Application Program Interface (API). These may include interfaces to other operating support systems. For example, one task in a process might be **verify address.** Using a third-party address verification software package, the API can be used to send order data to this software whenever an order reaches the verify address task in a process. The API then receives a response back from the software and notifies OMS of the resulting status.

When an order is opened for display or editing, it is presented in a format based on the *view* associated with the order type and the given task. A user with Administrator privileges creates the order views in the OMS Administrator. Views can be used to restrict the information displayed, to define mandatory fields that must be added before the task can be completed, and to write-protect fields. Certain tasks may require a read-only view of the order, while others may require that additional information be entered.

Task states and statuses

States are used to indicate what is happening to an order. Manual and automated tasks have the following predefined states—Received, Assigned, Accepted, Suspend, and Completed.

Table 1: Predefined states for orders

State	Description
Received	The order has arrived at the task and needs to be worked on. This state is mandatory for all manual and automated tasks.

Table 1: Predefined states for orders

State	Description
Assigned	The task has been assigned to a specific user. Tasks that are in the assigned state cannot be worked on by other users. Users with assignment privileges can re-assign tasks if needed.
Accepted	A user has accepted the task and is working on it. A task can be Accepted by a user that explicitly changes the state of the task to Accepted or by editing the order. Once a user has accepted the task, other users are prevented from modifying the task so they can see a read-only view of the task.
Suspend	A task that is not pre-defined. Suspend states are defined by the OMS Administrator. One or more Suspend states may be used to indicate that a task is held up for particular reasons or to indicate the progress of automated tasks.
Completed	The user is finished with the task and that the order is ready to move to the next task in the process. When changing a task to a completed state, the user also selects a completion status. The the OMS Administrator defines the status. It is used to indicate a result of the task which OMS then uses to determine the next task(s) to send the order to. The statuses generally represent a successful or unsuccessful result.

The system maintains a complete audit history of orders while they are in OMS, including all state changes in a task. When the order first arrives, it is in a Received state indicating that it is a new order and that no one is currently working on it. Each time a task state changes or the

order moves to another task, the order is stamped with the current time, task name, state, and user name.

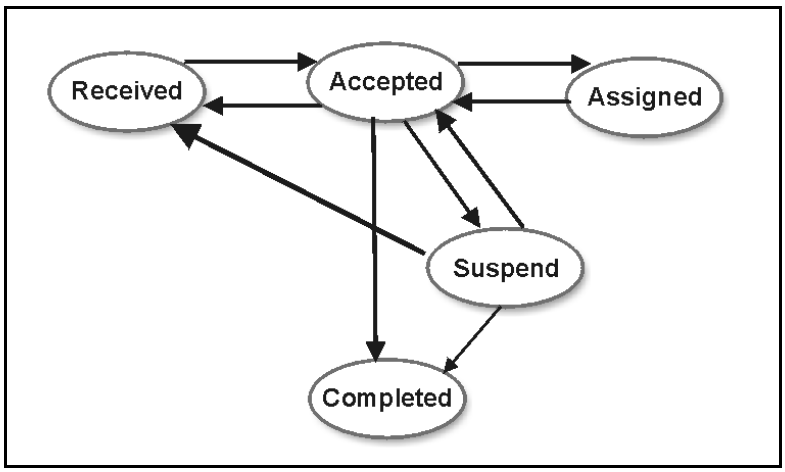


Figure 2: Task state transition

OMS Web Client functionality

The OMS Web client provides the user interface to the worklist order tracking and operational reporting information. It lets you create, view, edit, track, and report on service orders in OMS using a web browser.

Creating orders

Customer service orders can originate from one or more external order entry systems, while network service orders are often generated internally through an internal order entry system or OMS.

Using OMS to enter orders

Orders are collections of data used to express a request for service on a network. You can create an order in OMS. It verifies that all mandatory fields have been entered before allowing the order to be submitted for processing. This guarantees that incomplete orders cannot enter the system.

External order entry

External systems can create orders in OMS using the Extensible Markup Language (XML) API. The XML API provided with OMS can be used to build customer-specific interfaces.

Managing tasks

You use the Worklist to manage your tasks. It displays a list of orders currently located at the task or tasks for which you are responsible. You can view, add, or modify the data associated with an order by selecting the order from the worklist. Sorting and filtering options help you to find orders in the worklist.

Editing orders

You can display or edit orders in the Order Editor view. Orders are displayed according to an order's view at a given task. According to the views that are defined by the OMS System Administrator, fields can be defined as mandatory, read-only or read-write, and can have multiple instances.

Field level security

Field level security can be configured in the OMS Administrator for each manual and automated task. This security is enforced for the fields that appear in the Order Editor, the XML API, and the Automation Component. For example, you may want users to view the fields as read-only or define them as mandatory.

OMS provides flexible field level mask controls for input such as telephone numbers, lookups, and alphanumeric formats.

Calendar scheduling

Tasks are scheduled for completion using the task and expected duration, the hours and days of a work week, and holidays set for the workgroup associated with the task. These will have been defined by the OMS Systems Administrator. This allows orders to be worked on by different workgroups that work different business hours.

Task assignment

If you have assignment privileges for a given task, you can assign orders in that task to a specific user.

Exception processing

An exception is a mechanism used to interrupt or stop an order, or to re-direct it to a task in the process to a different process. The choices are defined by the OMS Administrator and identified by the exception statuses. Exceptions may be used to cancel an in-progress order, to add supplemental information to an order and re-direct the order to an earlier task in the process, or to take other actions defined in the original process.

Exception statuses are user-defined statuses used to alter a process flow from anywhere in the process. For instance, you may want to cancel an order, redirect an order to another task, or

redirect an order to a task in another process. The exceptions can be defined with restrictions that allow only certain, specified workgroups, activities, or order type/sources (or combinations of these) to raise the exception.

Data audit/order history

Audit data is captured with each order for all changes to data and is maintained as long as needed in the OMS system. You can use this information for operational, service level agreement, or business analysis purposes. The OMS Order History provides a process history for a given order. When task state changes occur, OMS records the date and time of the change, and the user who made the change.

Order query

You can locate any order in OMS using the Query option. You can query for any order in the system, including completed orders.

Notifications

Notifications can be used to notify you of processes or tasks in jeopardy. OMS provides the capability of sending event notifications through email to user groups once, periodically, or when certain conditions arise in a service order or task.

The Notifications view is where you view and acknowledge notifications on the order process or order data in OMS. When a given notification condition is detected, each targeted user and/or Workgroup is notified through email and an entry is added to the notification list. If a user is not logged on, the notification is queued.

Reports

Reports provide summarized information on all orders and tasks in OMS. You can view the number of overdue orders, the oldest orders, the most recent orders, and the completed tasks for each order.

The order detail report provides information on any order in the system. You can view, print, or save this report to an ASCII text file.

Localizing settings

OMS supports Windows 2000 regional settings. For the Web Client localization, refer to the *MetaSolv OMS Installation and Setup Guide*.

OMS Views

This chapter details the views available in Order Management System (OMS). The following sections are included:

- Overview
- Starting the OMS Web Client
- Customizing your display

Overview

A *view* is a browser page that displays specific information. The main views in the OMS Web Client are:

- New Order
- Worklist
- Query
- Reporting
- Notifications
- Options

There are several other views in the system, but you perform most of your work using these primary views.

When you initially open the system, the Worklist view is displayed.

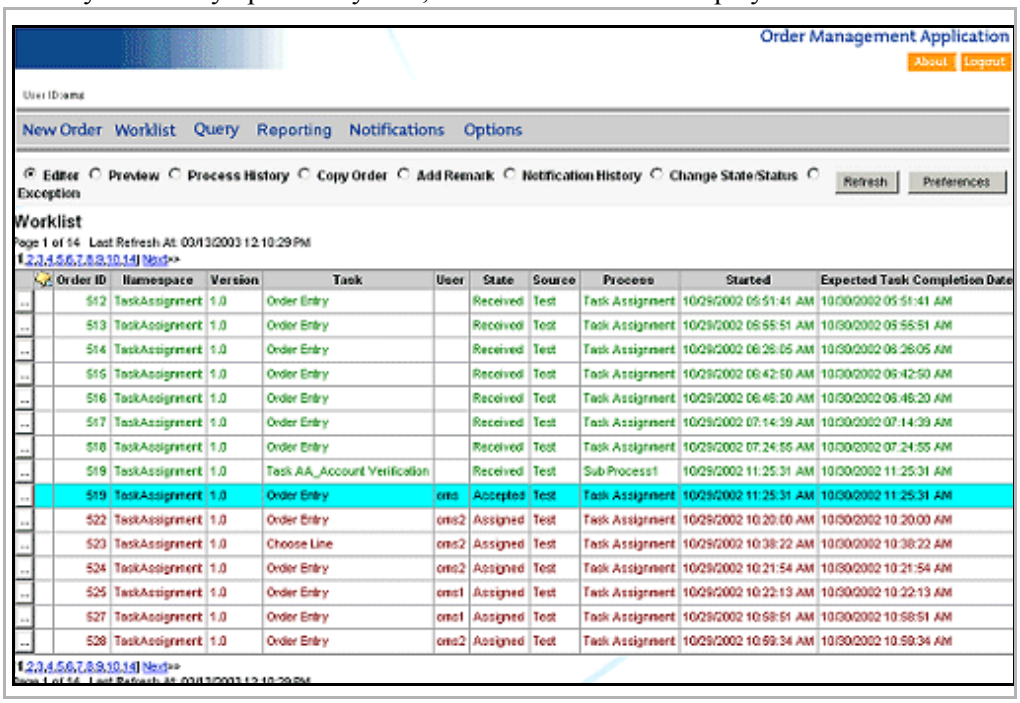


Figure 3: Worklist view

New Order view

Use the New Order view to enter orders into the OMS Web Client. After you enter the new order, the Order Editor view appears where further information is required to complete the order.

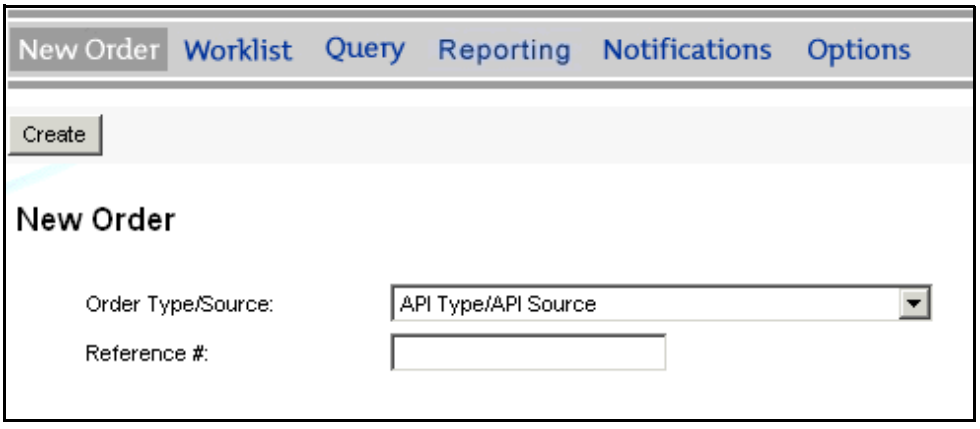


Figure 4: New Order view

Worklist view

The Worklist view (shown in Figure 3 on page 10) displays a list of orders located at the tasks for which you are responsible.You select the task for an order from the Worklist to complete that task. You can customize the Worklist view to display the information you want to see, change the sort order and filtering, and adjust the colors of the worklist.

To display specific columns in the Worklist, see "Displaying, hiding, and reordering columns" on page 18.

Query view

Use the Query view to retrieve any orders in the system, including those that are not located in your task list.

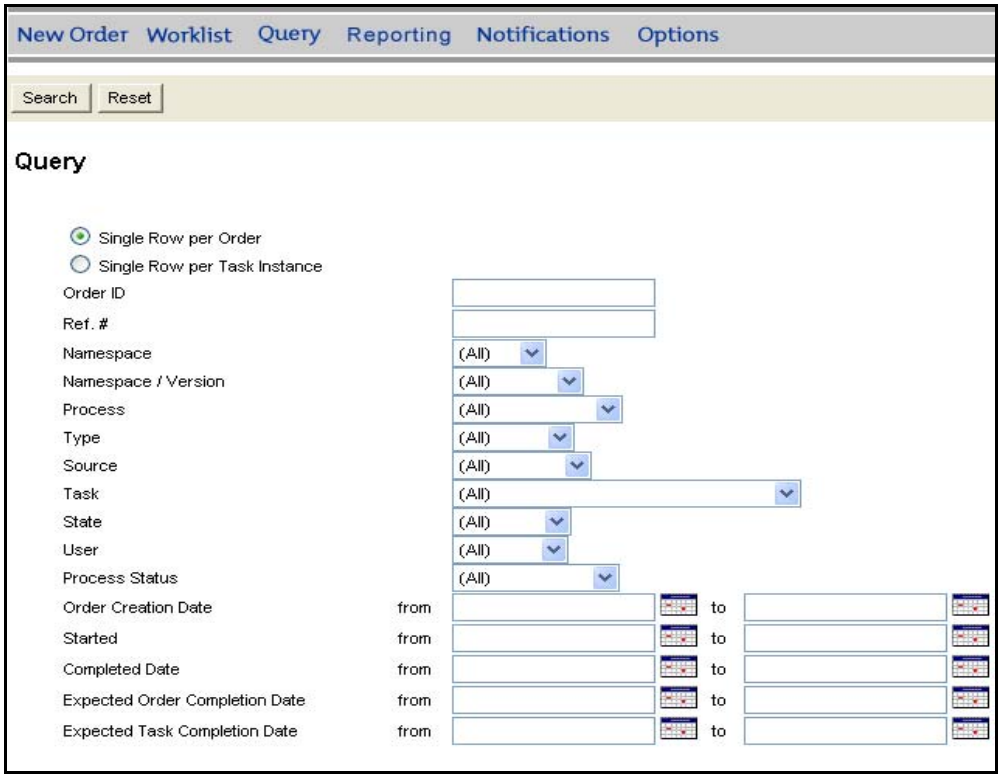


Figure 5: Query view

Reporting view

Reporting provides summarized information on all orders and tasks in OMS. You can view the number of overdue orders, the oldest orders, the most recent orders, and the completed tasks for each order.

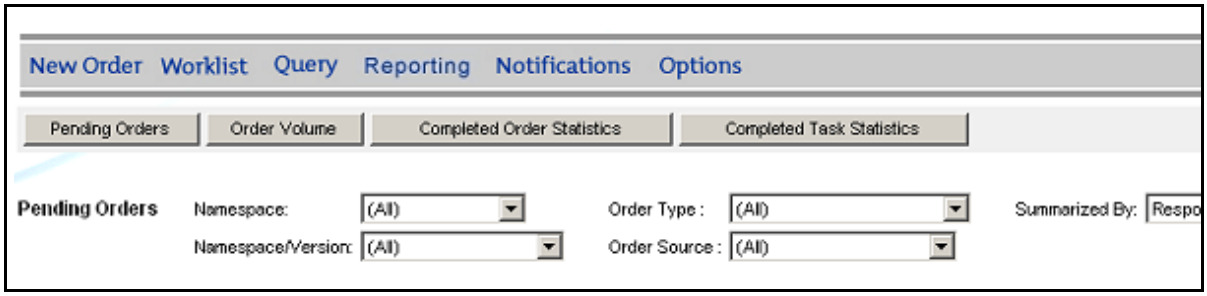


Figure 6: Reports view

Notifications view

Use the Notifications view to set up notification conditions for OMS to check for specific conditions on the order process or order data. When a given notification condition is detected, each targeted user and/or Workgroup is notified by email and an entry is added to the notification list. If you create new notifications in the OMS Administrator, you must refresh the cache for these changes to take effect. These notifications do not appear in the OMS Web Client until the next time you log in or click **Refresh**. If you are not logged in when a notification occurs, the notification is queued until you log in.

Figure 7: Notifications view

Notification messages

The Acknowledgement(s) view displays information for to each notification. When you acknowledge a notification, the author, date, description, message, and if the notification was modified appears in the Acknowledgement(s) view.

To add a notification message, see “Adding a message to a notification” on page 43.

Options view

Use this view to:

- set your email account to receive notifications
- select specific time zones
- change the initial screen displayed by OMS when you log-in. Options include:
  - Worklist (default) — the OMS Worklist view (see "Worklist view" on page 11)
  - Home — the OMS Home screen, from which you can navigate to all other OMS Web Client views
  - About — the OMS About screen, containing information about the currently installed OMS release level
  - Query — displays the OMS Query view (see "Query view" on page 11)
- change the text and text background colors to differentiate orders at different task states

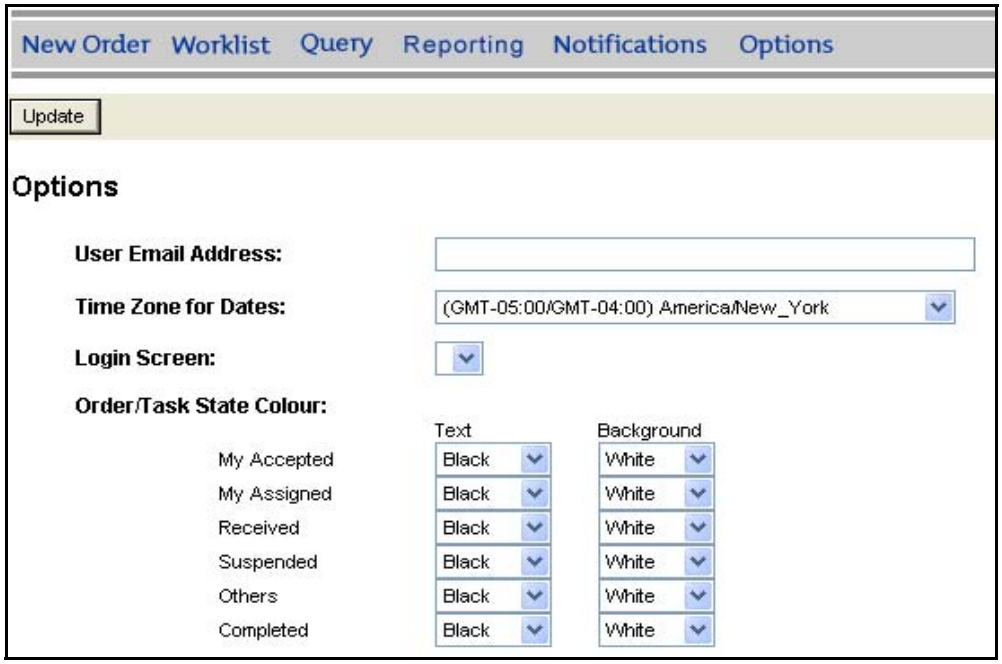


Figure 8: Options view

Starting the OMS Web Client

If you do not know your user name or password, contact your OMS System Administrator.

If you are starting the OMS Web Client for the first time after an OMS upgrade, you must clear the temporary internet files from your web browser's cache before you log into the OMS Web Client. If you do not, you may experience unexpected errors caused when the web browser attempts to use earlier versions of certain OMS Web Client files in the cache that must be changed as a result of the upgrade. OMS will automatically download the required new files when you log in for the first time after the upgrade.

For information on how to clear the temporary internet files and ensure that OMS automatically downloads the new files, see **To clear temporary internet files**, below.

To log into the OMS Web Client

1. In the **Address** field of your Web browser, type the login URL and press ENTER.
2. In the **User Name** field, type your user name.
3. In the **Password** field, type your password.
4. Click **Login**.

If you leave the Web Client inactive for 45 minutes or more, your session expires and you must log on again. Any updates not saved are lost.

If you need to run a second, concurrent OMS session from the same OMS server on a single workstation, do so by opening a new browser window from the desktop. *Do not* open a new browser by clicking **File**, **New**, **Window** from the browser's menu bar. If you do, the original session is shared between the two windows.

To clear temporary internet files

1. Open the Internet Explorer browser.
2. In the *Tools* menu, select **Internet Options...**. This opens the *Internet Options* dialog.
3. From the *Temporary Internet Files* group box under the *General* tab, click **Delete Files**.
4. Check the *Delete all offline contents* box.
5. Click **OK**.
6. In the *Temporary Internet Files* group box, click **Settings**.
7. Under the *Check for newer versions of stored pages* heading, ensure the *Automatically* radio button is selected.
8. Click **OK**.

Customizing your display

Use the Preferences view to define the way information appears on your screen. You can find the Preferences view in the Worklist, Notifications, and Query views.

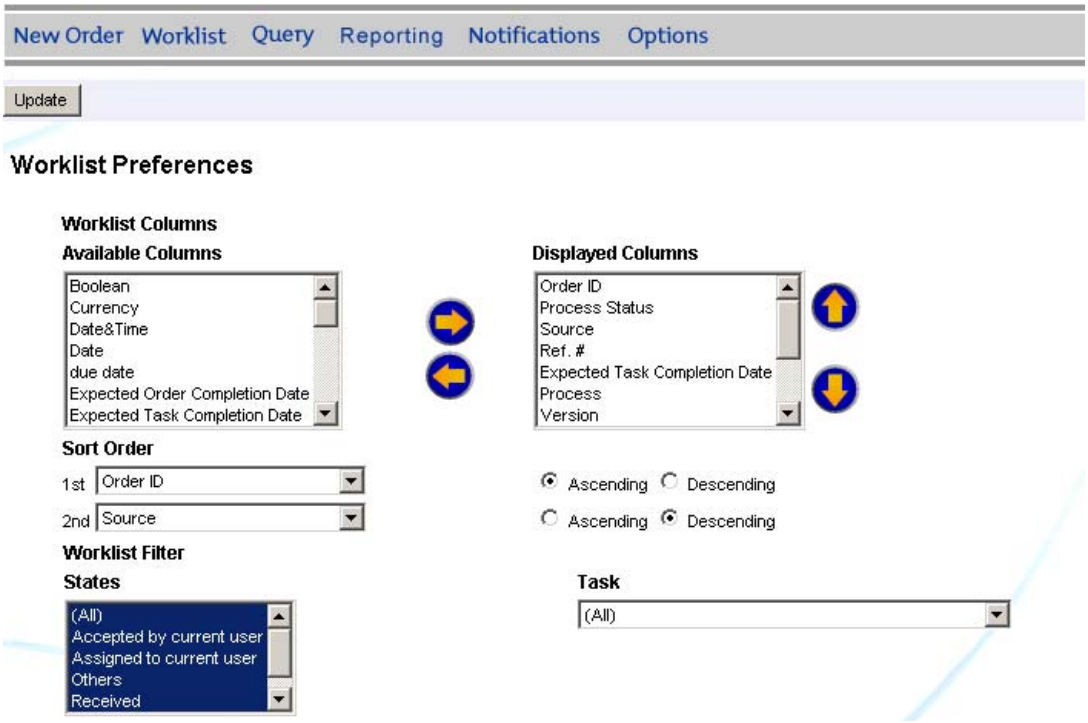


Figure 9: Worklist Preferences view

After you change the Worklist Preferences view, you must click **Refresh** to see them in the Worklist. Any changes you make are automatically saved when you exit the system.

For best results, be sure your fonts remain set to the default to prevent some fields from potentially overlapping.

Sorting information

When OMS first displays the Worklist view, it sorts the orders by state, as follows:

1. Accepted (by the current user)
2. Assigned (to the current user)
3. Received (by all users)
4. Suspended (by all users)
5. Others (all other users)

You can change the way in which these columns are sorted by specifying a primary and secondary sort criteria. You do this from the Worklist Preferences, Notifications Preferences, and Query Preferences view.

To sort orders

1. From either the Worklist, Notifications, or Query view, open the Preferences view. (See Figure 9 on page 16 for an illustration of the Preferences view from the worklist.)
2. Choose a primary sort order. From the **1st Sort Order** list, select a column name to be the primary sort order, then select **Ascending** or **Descending**.

If you do not want to specify a secondary sort order, select `None` in the **2nd Order Sort** list, as described below.

3. Choose a secondary sort order. From the **2nd Sort Order** list, choose a column name to be the secondary sort order, then select **Ascending** or **Descending**.
4. Click **Update**.

You can revert the sorted information back to the default order by choosing **Default** from the **Sort Order** list.

To temporarily sort on a column

Click the link at the top of the column on which you want to sort.

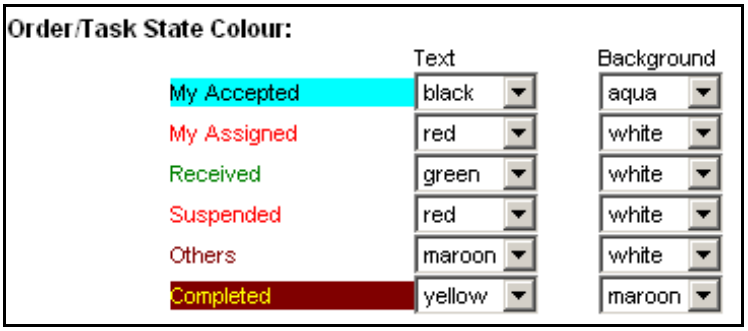
You can sort on every column. When you click to sort the first time, the worklist is sorted in ascending order of the values in that column. When you click on the same column link again, it is sorted in descending order.

Changing the colors of states

You can change the background and text colors used to represent the different states of orders in the Worklist, Query, and Change Task/Status views.

To change the color of the order state

1. Click **Options**.
2. On the **Options** window, choose a color from the **Order/Task State Colour** list.



3. Repeat step 2 for each order state.
4. Click **Update**.

Displaying, hiding, and reordering columns

Using the **Preferences** option, you can choose the columns you want to display in the Worklist, Query, and Notifications views and the order in which you want them to appear. If you remove all columns from the **Display Columns** list, the default columns still appear in the Worklist.

To display, hide, or reorder columns

1. In the Worklist view, click **Preferences**.
2. Do any of the following:
   - To display a column, in the Worklist Preferences view, select a column from the **Available Columns** list and click the right arrow button to move it into the **Displayed Columns** list.
   - To hide a column, select a column from the **Displayed Columns** list and click the left arrow button to move it into the **Available Columns** list.
   - To change the order of columns, select a column name from the **Displayed Columns** list and use the up and down arrow buttons to place it in the appropriate position.
3. Click **Update**.

Logging out

You must log out of the OMS Web Client before going to another URL destination in your web browser. If you do not click log out, OMS assumes you are still logged in. Therefore, you must close and reopen your browser.

Managing Orders

This chapter describes how to create and manage orders. The following sections are included:

- Overview
- Creating orders
- Editing orders
- Adding additional information to orders
- Canceling or redirecting orders
- Managing notifications

Overview

Orders are managed through the Worklist. The Worklist is the part of the OMS Web Client that lists orders that are located at the tasks for which you are responsible. You can customize the information displayed in your Worklist by changing the sort order and filtering, and adjusting the colors of the Worklist.

After you update an order (assign it, add remarks, etc.), the order in the Worklist changes to bold and italicized text.

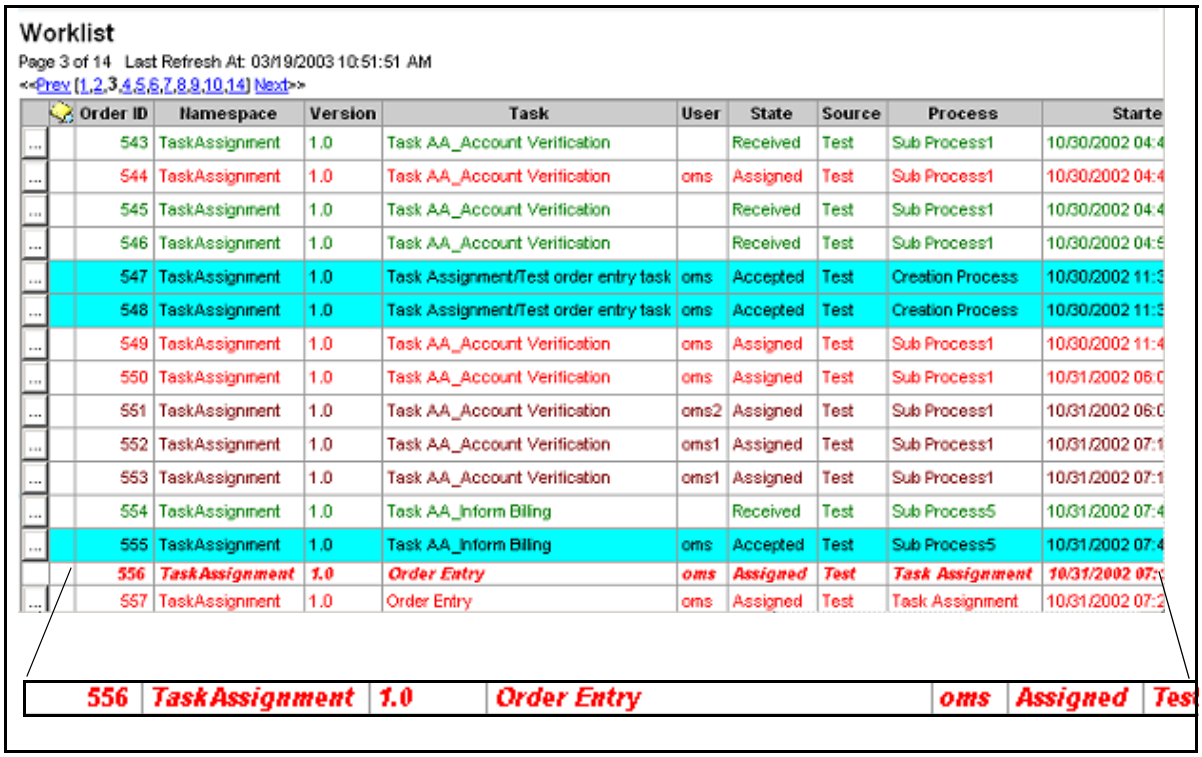

Worklist
Page 3 of 14 Last Refresh At: 03/19/2003 10:51:51 AM
<<Prev [1,2,3,4,5,6,7,8,9,10,14] Next>>
Order ID | Namespace | Version | Task | User | State | Source | Process | Starte
543 | TaskAssignment | 1.0 | Task AA_Account Verification | | Received | Test | Sub Process1 | 10/30/2002 04:4
544 | TaskAssignment | 1.0 | Task AA_Account Verification | oms | Assigned | Test | Sub Process1 | 10/30/2002 04:4
545 | TaskAssignment | 1.0 | Task AA_Account Verification | | Received | Test | Sub Process1 | 10/30/2002 04:4
546 | TaskAssignment | 1.0 | Task AA_Account Verification | | Received | Test | Sub Process1 | 10/30/2002 04:5
547 | TaskAssignment | 1.0 | Task Assignment/Test order entry task | oms | Accepted | Test | Creation Process | 10/30/2002 11:3
548 | TaskAssignment | 1.0 | Task Assignment/Test order entry task | oms | Accepted | Test | Creation Process | 10/30/2002 11:3
549 | TaskAssignment | 1.0 | Task AA_Account Verification | oms | Assigned | Test | Sub Process1 | 10/30/2002 11:4
550 | TaskAssignment | 1.0 | Task AA_Account Verification | oms | Assigned | Test | Sub Process1 | 10/31/2002 06:0
551 | TaskAssignment | 1.0 | Task AA_Account Verification | oms2 | Assigned | Test | Sub Process1 | 10/31/2002 06:0
552 | TaskAssignment | 1.0 | Task AA_Account Verification | oms1 | Assigned | Test | Sub Process1 | 10/31/2002 07:1
553 | TaskAssignment | 1.0 | Task AA_Account Verification | oms1 | Assigned | Test | Sub Process1 | 10/31/2002 07:1
554 | TaskAssignment | 1.0 | Task AA_Inform Billing | | Received | Test | Sub Process5 | 10/31/2002 07:4
555 | TaskAssignment | 1.0 | Task AA_Inform Billing | oms | Accepted | Test | Sub Process5 | 10/31/2002 07:4
556 | TaskAssignment | 1.0 | Order Entry | oms | Assigned | Test | Task Assignment | 10/31/2002 07:
557 | TaskAssignment | 1.0 | Order Entry | oms | Assigned | Test | Task Assignment | 10/31/2002 07:2
556 | TaskAssignment | 1.0 | Order Entry | oms | Assigned | Test

Figure 10: Changed orders are shown in italicized, bold text

The following table lists the default columns in the Worklist.

Table 2: Default columns in the Worklist view

Column	Description
Started	Date and time when the order entered the task.
Order Creation Date	The date and time that the order was created.
Order ID	The order ID generated by the system when the order is entered.
Source	Where the order originated. For example, client care, fax, etc.
Type	Type of order. For example, facility change, request for new line, etc.

Table 2: Default columns in the Worklist view

Column	Description
State	State of the order at the current task. Valid states are: **Received**—the task for that order has been received in the system and is waiting to be accepted. **Assigned**—the task for that order has been assigned to a user. **Accepted**—the task for that order has been accepted by a user. **Suspended**—the task for that order is held for review for additional information, etc.
Process	The name of the process.
Ref. #	An alphanumeric value associated with the order, typically for the OMS order to an external identifier, such as a sales order.
Process Status	The status of the order in the process.
Task	The name of a task where the order is currently located.
User	The user who has accepted the order, suspended the order, or to whom the order has been assigned.
Expected Order Completion Date	The date and time the order is expected to be completed.
Expected Task Completion Date	The date and time that the task is expected to be completed.

If changes are being made in the OMS Administrator, you must refresh the browser for these changes to take effect in the Web Client. These changes include:

- Creating new notifications
- Creating tasks the user can view
- Changing security settings
- Changing order type/source views

These changes do not appear in the OMS Web Client until you click **Refresh**.

Order Editor

Use the Order Editor to enter the order information. The Order Editor displays fields that a System Administrator has defined in the OMS Administrator. These fields may require you to enter information, they may be read-only, or the may be populated with information by default. You will find the following field types in the Order Editor.

The content of the illustrations in this section are only examples. The content of your order editor depends on how it is defined by the OMS Administrator.

- **Mandatory**—Mandatory fields must be completed before an order can proceed to the next task in the process. These fields are marked with a red dot.

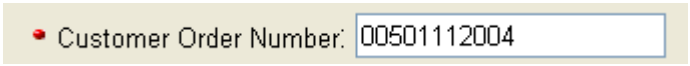


Figure 11: Mandatory Field

- **Optional**—Optional fields are completed at your discretion. You can leave these fields blank and the order will still proceed to the next task in the process.
- List—A List field lets you enter more than one group of values to a group node. For example, in the illustration below, you can associate from 0 to 8 Service Features with the order (as indicated by 0...8 in the brackets to the right of the main field label). For every new service you want to add to the order, you click the plus ( ) button, which adds a new Service Feature group. In this example, the customer has ordered two Service Features, 3 Way Calling and Caller ID Blocking . To remove a Service Feature group, you click the associated remove symbol ( ).

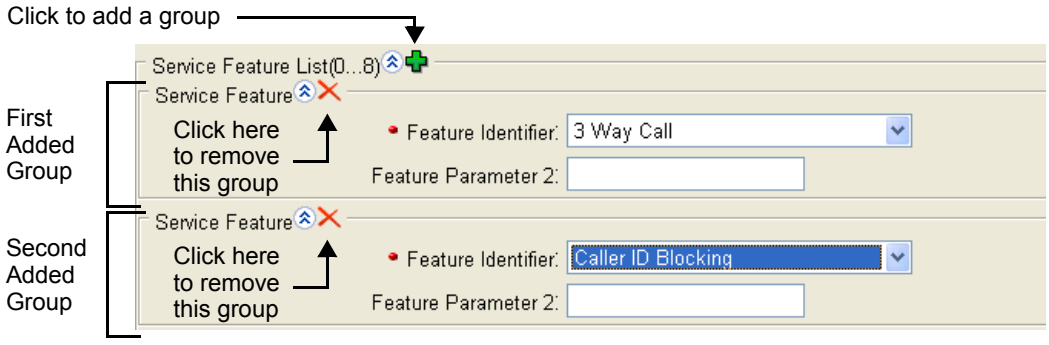


Figure 12: List Fields

- **Read-only**—A field you can see, but cannot modify or delete. If the field contains more than 30 characters, a + sign graphic appears that you can click to display the full text in the field. The maximum number of characters for a text field is 1000.

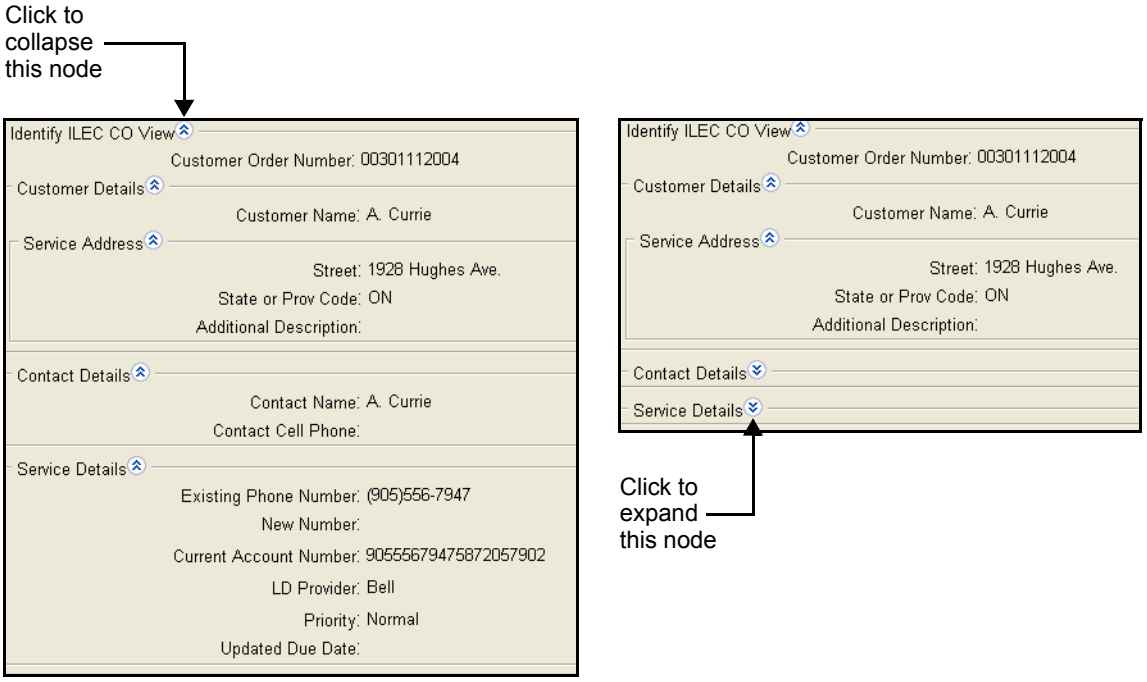
Expanding and collapsing nodes

The Order Editor also has an expand and collapse feature that lets you view or hide node details as required. This feature lets you manage the way in which OMS displays the order information by changing the size of the nodes.

This feature is controlled through the Expand/Collapse button, which has two states, either:

- —the node is expanded. When you click the button in this state, it collapses the node.
- —the node is collapsed. When you click the button in this state, it expands the node.

The left-hand illustration below, shows the order editor with all of its defined nodes expanded. The right-hand illustration shows the same order editor view with the Contact Details and Service Details nodes collapsed. Notice how, with some of the nodes collapsed, the view requires less on-screen room.



Default behavior

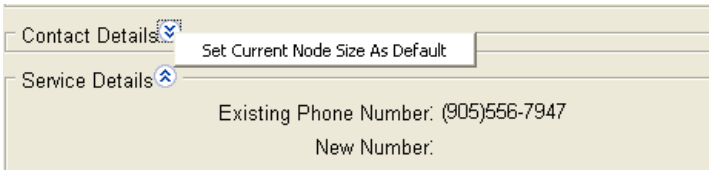
By default, the Order Editor displays all of the nodes in the expanded mode. If you change the size of a node, OMS remembers the change for that instance of the node (that is, on that specific order, within that specific view, with that specific instance of the node) for the duration of your session. If you close your session, OMS returns the nodes to their default size and this is how they appear when you restart the session.

You can, however, change the default, so that a particular node always opens in the size of your choice.

The default node size applies only within a specific view. If the same node appears in several views, you must set the default for the node within each view.

To change the default

1. Size the node as you want, either expanded or collapsed.
2. Place the mouse pointer over the Expand/Collapse button and right-click. OMS displays the following message: Set Current Node Size As Default.



3. Click the message. This changes the default so that OMS displays that instance of the node, in that view, at that size whenever you open a session.

Previewing an order

You can view information that appears in the Order Editor. When you click **Preview** and select the appropriate order, the information in the Order Editor is displayed in a more readable format.

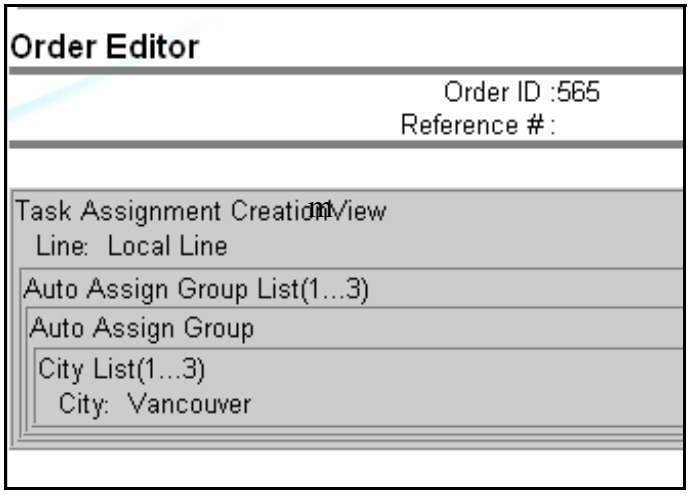
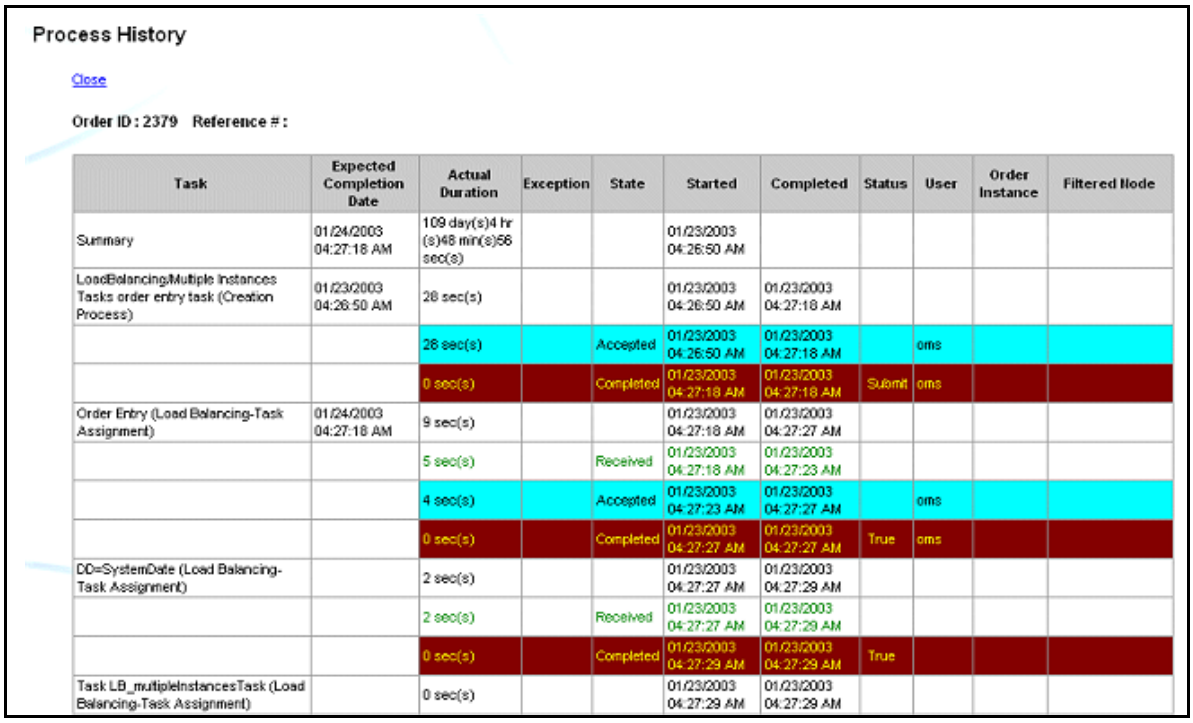


Figure 13: Previewing an order

Process History

The Process History displays the current task as well as the tasks that have been completed for an order. It also contains the dates, times, and all user information for that order as it goes through the process. You can also display the Process History in a pie chart or Gantt chart.

If the Process History contains both system-based and schedule-based tasks, the summary actual duration is calculated as if all tasks are system-based.



Process History

Close

Order ID : 2379 Reference # :

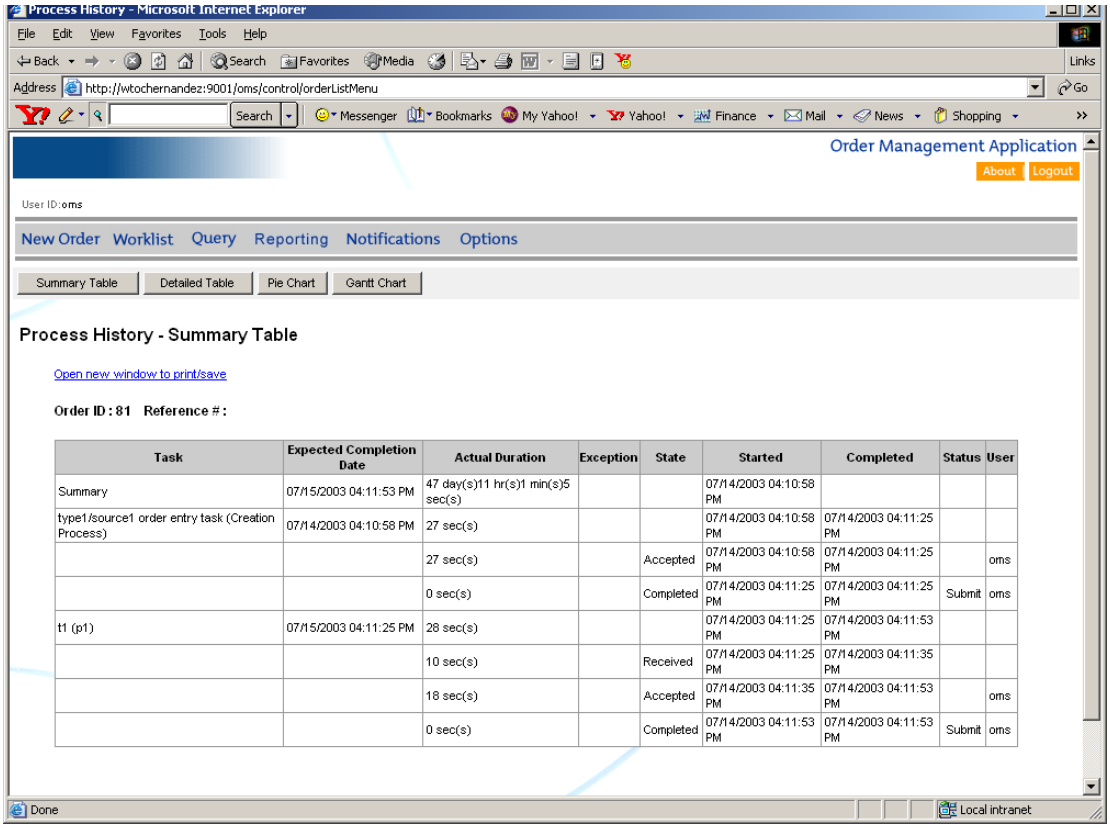
Task	Expected Completion Date	Actual Duration	Exception	State	Started	Completed	Status	User	Order Instance	Filtered Node
Summary	01/24/2003 04:27:18 AM	109 day(s)4 hr (s)48 min(s)56 sec(s)			01/23/2003 04:26:50 AM					
LoadBalancingMultiple Instances Tasks order entry task (Creation Process)	01/23/2003 04:26:50 AM	28 sec(s)			01/23/2003 04:26:50 AM	01/23/2003 04:27:18 AM				
		28 sec(s)		Accepted	01/23/2003 04:26:50 AM	01/23/2003 04:27:18 AM		oms		
		0 sec(s)		Completed	01/23/2003 04:27:18 AM	01/23/2003 04:27:18 AM	Submit	oms		
Order Entry (Load Balancing-Task Assignment)	01/24/2003 04:27:18 AM	9 sec(s)			01/23/2003 04:27:18 AM	01/23/2003 04:27:27 AM				
		5 sec(s)		Received	01/23/2003 04:27:18 AM	01/23/2003 04:27:23 AM				
		4 sec(s)		Accepted	01/23/2003 04:27:23 AM	01/23/2003 04:27:27 AM		oms		
		0 sec(s)		Completed	01/23/2003 04:27:27 AM	01/23/2003 04:27:27 AM	True	oms		
DD=SystemDate (Load Balancing-Task Assignment)		2 sec(s)			01/23/2003 04:27:27 AM	01/23/2003 04:27:29 AM				
		2 sec(s)		Received	01/23/2003 04:27:27 AM	01/23/2003 04:27:29 AM				
		0 sec(s)		Completed	01/23/2003 04:27:29 AM	01/23/2003 04:27:29 AM	True			
Task LB_multipleInstancesTask (Load Balancing-Task Assignment)		0 sec(s)			01/23/2003 04:27:29 AM	01/23/2003 04:27:29 AM				

Figure 14: Process History view (table format)

For more information on viewing the order process history, see “Viewing the Process History” on page 58.

Process History Summary

As an order moves to different tasks and states in a process, a history of each task and state transition is stored in the OMS database. The Order Process History Summary Table provides a summary of total time an order has been in a process, the creation transition and a list of these transitions you have previously enabled to show in Process History Summary Table.


Process History - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites Media
Address http://wtochernandez:9001/oms/control/orderListMenu
Order Management Application
About Logout
User ID:oms
New Order Worklist Query Reporting Notifications Options
Summary Table Detailed Table Pie Chart Gantt Chart
Process History - Summary Table
Open new window to print/save
Order ID : 81 Reference # :
Done
Local intranet

Task	Expected Completion Date	Actual Duration	Exception	State	Started	Completed	Status	User
Summary	07/15/2003 04:11:53 PM	47 day(s)11 hr(s)1 min(s)5 sec(s)			07/14/2003 04:10:58 PM			
type1/source1 order entry task (Creation Process)	07/14/2003 04:10:58 PM	27 sec(s)			07/14/2003 04:10:58 PM	07/14/2003 04:11:25 PM		
		27 sec(s)		Accepted	07/14/2003 04:10:58 PM	07/14/2003 04:11:25 PM		oms
		0 sec(s)		Completed	07/14/2003 04:11:25 PM	07/14/2003 04:11:25 PM	Submit	oms
t1 (p1)	07/15/2003 04:11:25 PM	28 sec(s)			07/14/2003 04:11:25 PM	07/14/2003 04:11:53 PM		
		10 sec(s)		Received	07/14/2003 04:11:25 PM	07/14/2003 04:11:35 PM		
		18 sec(s)		Accepted	07/14/2003 04:11:35 PM	07/14/2003 04:11:53 PM		oms
		0 sec(s)		Completed	07/14/2003 04:11:53 PM	07/14/2003 04:11:53 PM	Submit	oms

Figure 15: Process History - Summary Table view

Reporting view

The Reporting view provides the following summarized reports on all orders and tasks in OMS:

- Pending Orders Report
- Order Volume Report
- Completed Order Statistics Report
- Completed Task Statistics Report

For more information on viewing reports, see “Viewing pending orders” on page 59.

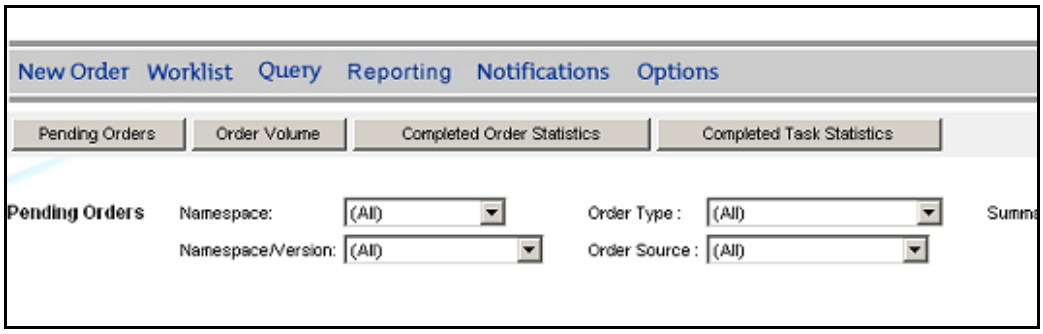


Figure 16: Reporting view

Remarks

In the Worklist view, you can enter comments and attach documents pertaining to each order using the **Add Remark** option. For example, if the task for an order has taken longer to complete than expected, you can add a remark explaining why this has happened. After you add a remark, a **View Remark(s)** icon appears in the Worklist beside the appropriate order. You can click the **View Remark(s)** icon to display the details, such as the user who entered the remark, the date and time it was entered, the task description, and the state of the task.

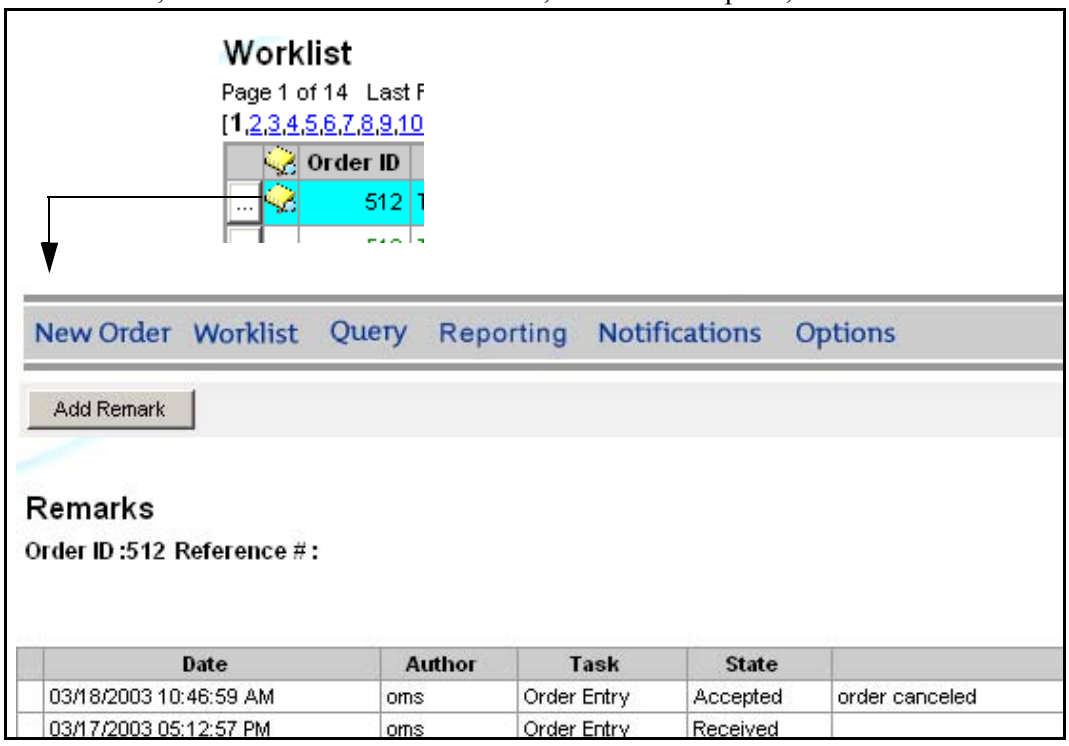


Figure 17: Viewing remarks for an order

Versioned orders

Each order you create is based on a *model* that consists of tasks, processes, order templates, workgroups, and worklists. Programmers in your organization define different models based on specific services your company provides. In OMS, a versioned order is one that is based on different versions of the OMS model. You create a versioned order by selecting a namespace and version from the **Cartridge** field. The use of namespaces allows service providers to separate their OMS model into specific services in their OSS environment. Each service can be implemented independently by a different team and then deployed into a single OMS environment.

You see the **Cartridge** field only if you have privileges to create versioned orders.

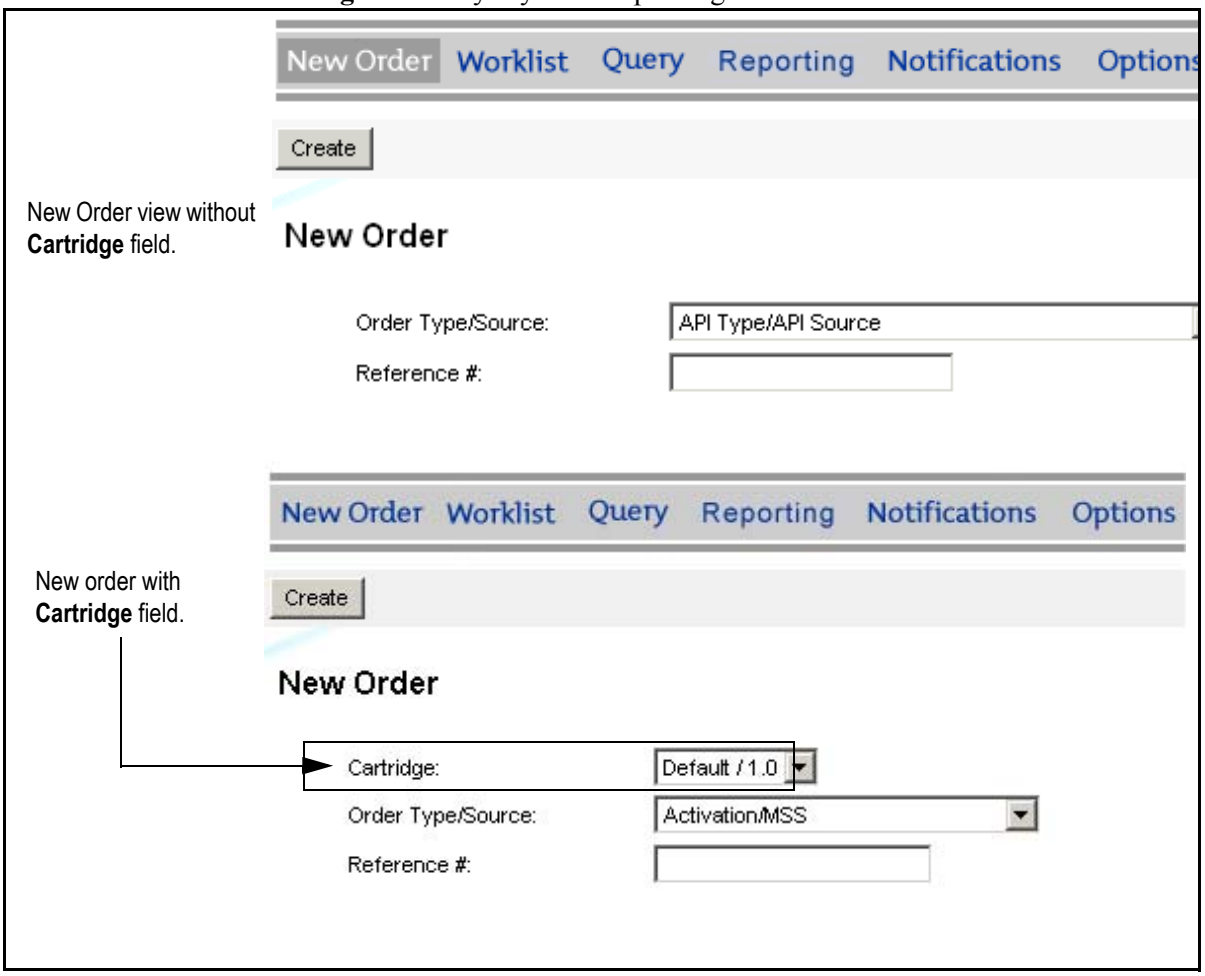


Figure 18: Cartridge field on the New Order view

Creating orders

In the OMS Web Client you can enter an order by clicking **New Order**. After you create a new order, the Order Editor appears displaying fields for further information to be completed.

If you cannot access the **New Order** view, you have not been assigned order entry privileges. See your Systems Administrator.

The following table describes the column names and definitions.

Table 3: Columns in the New Order view

Column	Definition
Cartridge	Lists applicable namespaces and versions.
Order Type/Source	List of order types and sources that you can create.
Reference #	An alphanumeric reference associated with the work order.

You must complete the fields that are marked with a red dot before you submit the order. If you do not have all of the information to complete the fields, you can save and close what you do have. The order is held in an Accepted state until you complete the information and change the state to Completed/Successful.

To create an order

1. Click **New Order**.
2. If you have privileges to create a versioned order, select the namespace and version from the **Cartridge** field.
3. In the **Order Type/Source** list, choose the appropriate order type/source.
4. In the **Reference #** field, type a reference number (optional).
5. Click **Create**.

   The order is created and the Order Editor appears. At this stage in the order process, the order is in the Accepted state.
6. Enter the appropriate information in the required fields.

   Each order displays different fields based on the order's type and source.
7. Click **Save**.

Changing the state/status of an task

States

After you complete a task and enter the information in the Order Editor, you must change the state or completion status to allow the order to continue to its next task(s). States determine the behavior of an order while they are located at a task in a process. When an order arrives at a task, it can assume any of the given states as shown in the following table.

Table 4: Available states for an order

State	Description
Received	The order that has arrived at a task, or is not being worked on.
Accepted	Locks the order for the user in the current task.
Assigned	The order has been assigned to a person in the workgroup.
Completed	Work on the task is finished.
Suspend	A user-defined state.

Statuses

You assign statuses to an order after you complete a task. They are used to determine the path an order takes in the process. After an order is complete, you can change the state to Completed and assign a status to the order. Predefined statuses for standard processes include:

- True
- False
- Submit
- Delete.

When using a workstream process, statuses appear as buttons on the workstream order editor's interface, which you click to assign the desired status. Much like the standard navigation buttons in any other wizard, the status buttons in a workstream process let you advance to the next task, go back to the previous task, cancel the task, and so on. Predefined stauses for workstream processes include:

- Back
- Next
- Cancel
- Finish

After you complete and submit an order, you can deleted it depending on the workgroup and tasks assigned. The order does not appear in your Worklist, but you can still query on it.

A list of available states and completion statuses is displayed in the Change State/Status view based on the current state of the order and its location in the process.

You can only move the orders that appear in your Worklist.

The following table describes the types of states that an order can assume based on its current state.

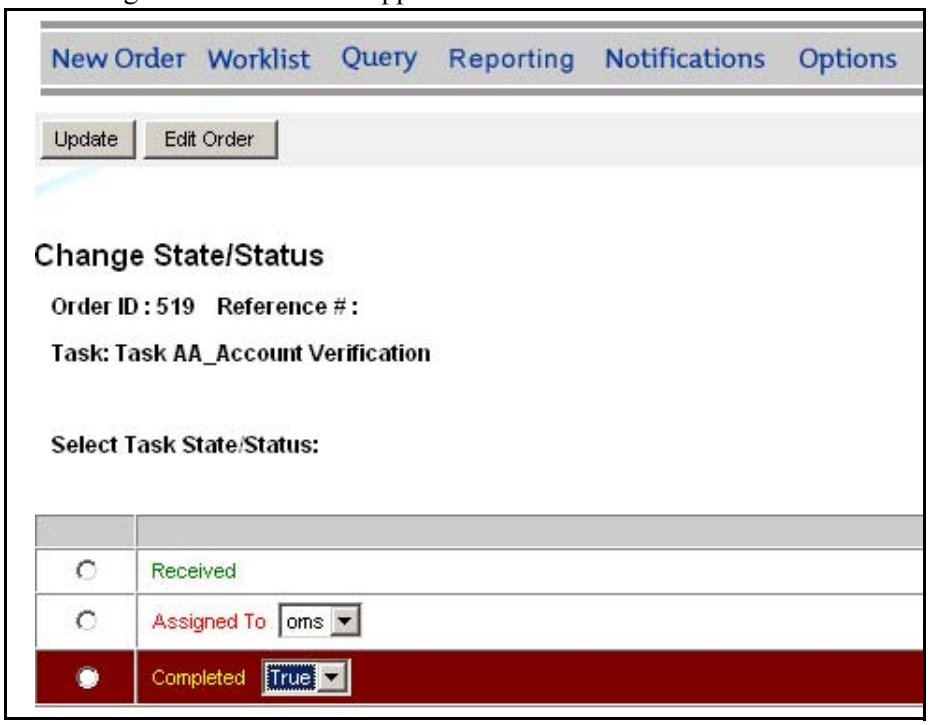
Table 5: States an order can assume based on its current state

From/To	Received	Assigned	Accepted	Suspended	Completed
Received		Yes, if assigned	Yes		
Assigned	Yes, if assigned. If you are the person to whom the order was assigned, you must first accept it.	Yes, if assigned	Yes, if assigned		
Accepted (By You)	Yes, if you accept it	Yes, if assigned		Yes	Yes
Suspended		Yes, if assigned	Yes	Yes	

To change the state/status of a task

1. In the Worklist, select **Change State/Status** and then select the appropriate task.

   The Change State/Status view appears.



2. Select the appropriate state and click **Update**.

Copying orders

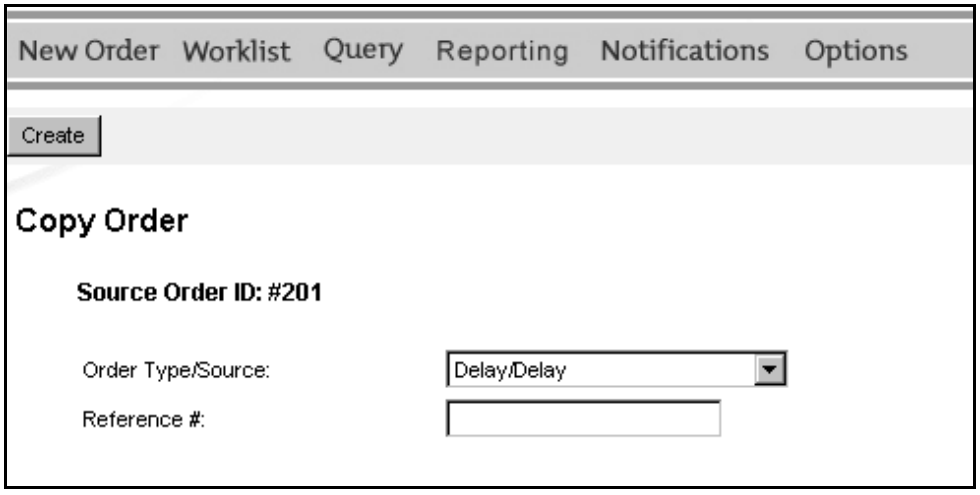
To reduce the amount of data entry required for orders that are similar, you can copy an existing order. For example, you may need to create orders that require an excessive amount of data, such as trunking orders, multiline hunt group orders, ISDN orders, etc.

When you copy an order, you can copy from any order in your Worklist to any order type that you can create. You can only copy the fields that are common to both the source order view and the new order view and that you are able to edit in the new view.

You must complete the fields that are marked with a red dot before you can complete the order. If you do not have all of the information to complete the fields, you can save and close what you do have. The order is held in an **Accepted** state until you complete the information and change the state to **Completed/Successful.**

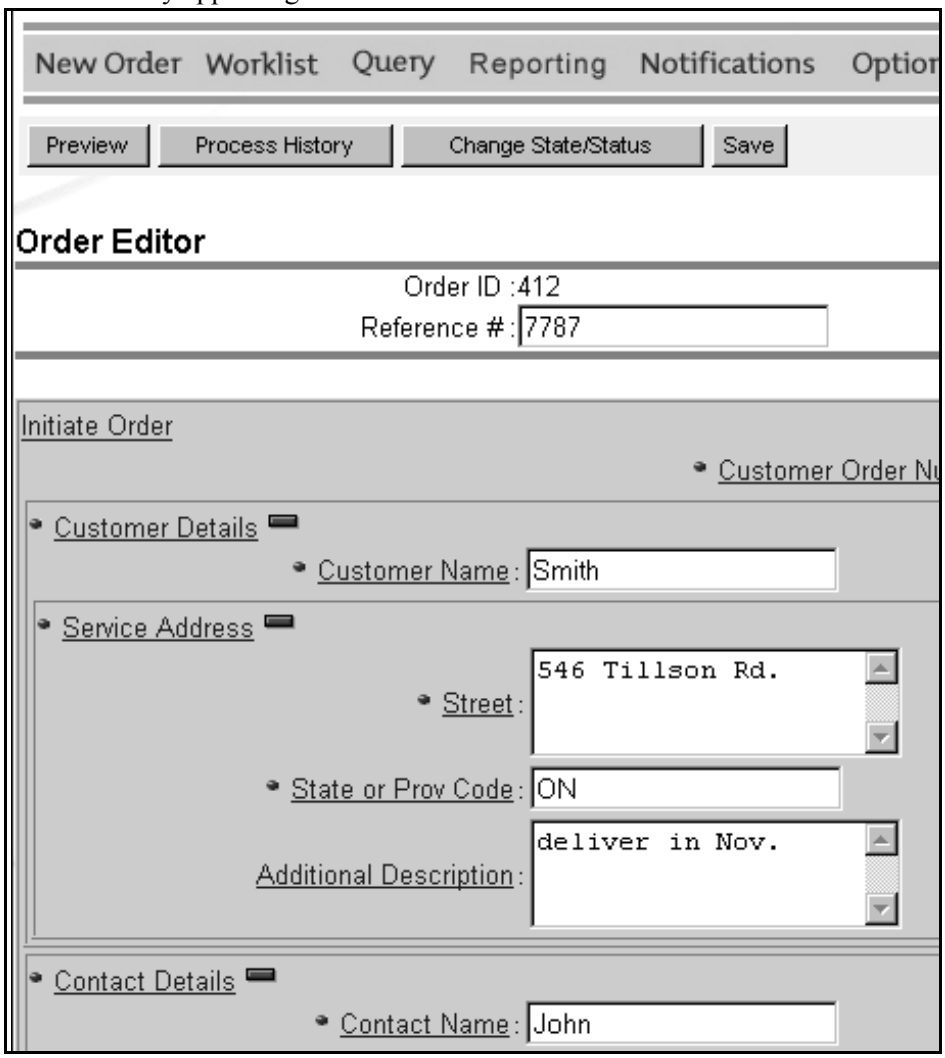
To copy an order

1. In the Worklist, select **Copy Order**, then select the appropriate order.



2. In the **Order Type/Source** list on the Copy Order view, choose the type/source of order.
3. In the **Reference #** field, type a reference number.
4. Click **Create**.

The order is created and the Order Editor view opens with the information that is copied automatically appearing in the fields.



5. Do one of the following:
   - Enter the appropriate information in the required fields.
   - Edit the existing fields.

   Each order displays different fields based on the order type and source.
6. Click **Save**.

Editing orders

After orders are entered into the system, you can start editing them. To edit an order, you must have specific privileges assigned to you by the OMS Administrator. You must then accept an order task, then enter the appropriate information into the Editor of the OMS Worklist. When all tasks for an order are completed, the order is complete.

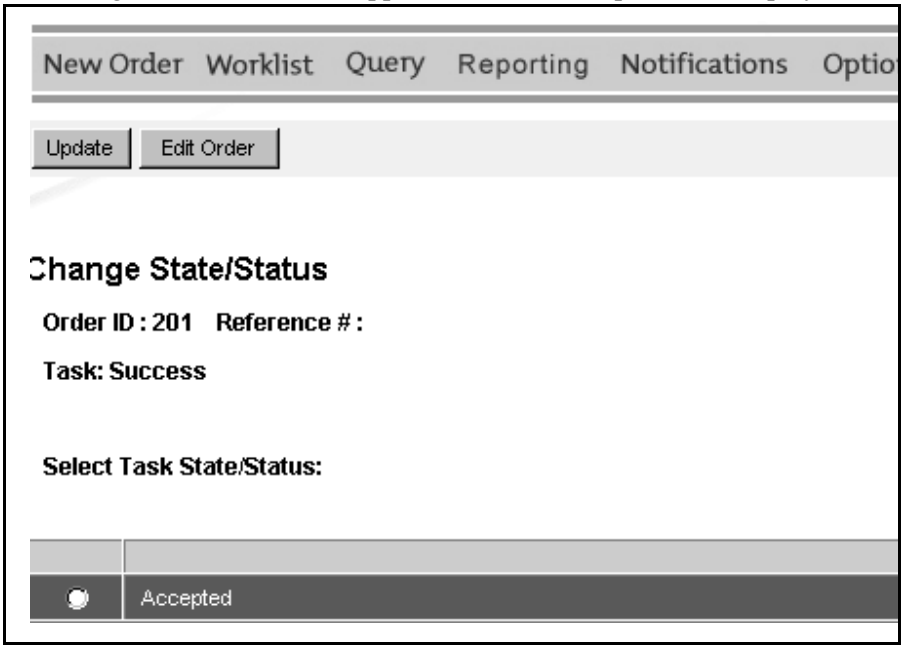
Accepting tasks

You can accept any task that is in a Received state in your Worklist. Since other users may also have the same tasks displayed and may have already accepted a task, you should update your Worklist using the Refresh option. If the task you have selected has been opened by another user, it is read-only.

To accept a task

1. In the Worklist, select a task that is in a Received state.
2. Click **Change State/Status**.

   The Change State/Status view appears with the Accepted state displayed.



3. Click **Accepted**, then click **Update**.

Completing tasks

To complete a task, you must complete all mandatory fields (displayed with red dot). If you do not have all of the information to complete the fields, you can save and close what you do have. The order is held in an Accepted state until you complete the information and change the state to Completed.

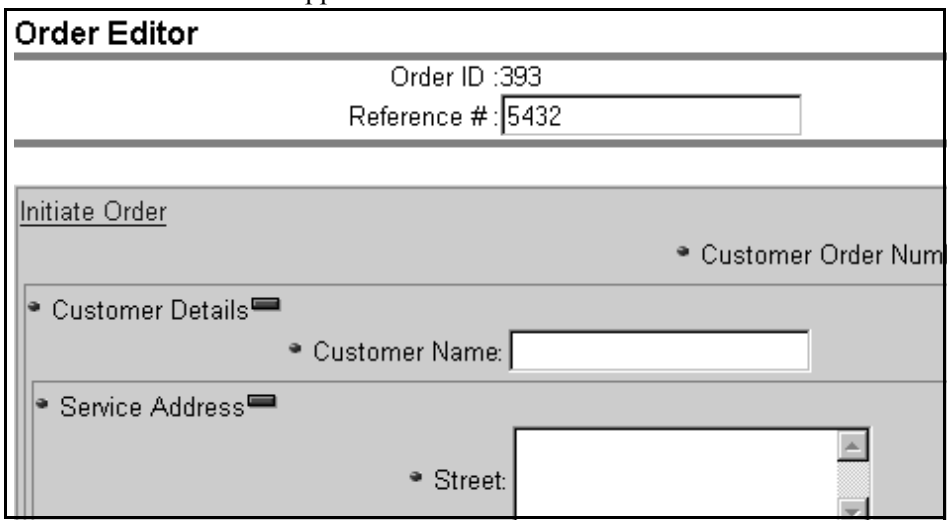
If you display an order containing default values, the order is automatically modified and therefore, must be saved. Default values are defined by an OMS Administrator for fields in a given view. When a System Administrator creates an order view, a default value can be entered into the appropriate fields. The default value then appears in the field of the view displayed in the OMS Web Client Editor.

To change the state of an order, see "Changing the state/status of an task" on page 30".

To complete a standard task

1. In the Worklist, click **Editor**, then select the appropriate task.

   The Order Editor view appears.



2. Enter the appropriate information and click **Save**.

   You can now change the state of this task. To change the state of a task, see "Changing the state/status of an task" on page 30.

Completing a workstream task

To complete a workstream task, click the Finish button. When you do this, OMS either takes you to the next task in the workstream, or to the worklist to select the next process (if that was the last task in the process).

If the task that follows an automated task in a workstream process uses a rule on transition, and that rule evaluates *false*, the process displays the wait screen until the rule evaluates *true*. When this happens, however, there is no message displayed on the screen to alert the user that the process is waiting for the rule status to change. As a result, the process may appear to have stopped. If the rule does not evaluate *true* within the specified timeout period, OMS displays a message indicating the timeout period is expired. To clear this message, click **OK**. OMS returns you to the worklist. The process will continue to evaluate the rule, and when it evaluates *true*, the process continues.

If the rule fails to evaluate *true* within a reasonable period of time, inform your OMS administrator.

If the workstream process you are working on does not display the Finish button, the system allows you to complete a task by using other standard process statuses, which are rendered in the (NAME OF DROP-DOWN LIST TBD) drop-down list. Alternatively, you can complete the task by going opening the Change Status screen from the default order editor.

Adding additional information to orders

In the Worklist view you can add remarks or attach documents that relate to a specific order.

Adding remarks to an order

When working on an order, you may want to add a remark pertaining to the order.

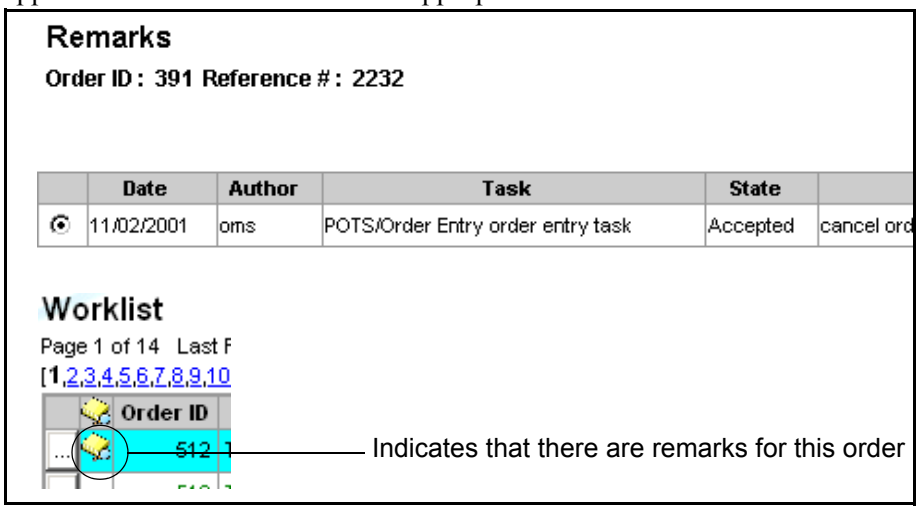
To add remarks to an order

1. In the **Worklist**, click **Add Remark** and select the appropriate order.

   To attach documents to a remark, see "Attaching documents" on page 38.

2. Add your remarks and click **Save**.

The **Remarks** window opens, showing the user who entered the remark(s), the date entered, the task description, and the state of the task. A **View Remark(s)** icon also appears in the Worklist beside the appropriate order.



Editing remarks

After you add a remark to an order, you can modify it at any time. A remark can only be modified by the user who created it.

To edit a remark

1. In the **Worklist**, click the **View Remark(s)** icon beside the appropriate order.
2. In the Remarks view, select the appropriate remark and click **Modify Remark**.
3. In the Modify Remark view, change your remarks and click **Done**.

Attaching documents

You can attach a document file to an order only if a remark has been created.

To attach a document to an order

1. In the Worklist, select **Add Remark** and then select the appropriate order.
2. In the Add Remarks view, click **Save**.
3. Click **Modify Remark**.
4. In the **Attach File** field on the Modify Remark view, type the file path or click **Browse** to locate the document.
5. Locate the document and click **Open**.
6. Click **Add Attachment**.

7. Click **Done**.

   The Remarks dialog appears containing information such as the user who entered the remark(s), the date entered, the task description, the state of the task, and the file name of the attachment.

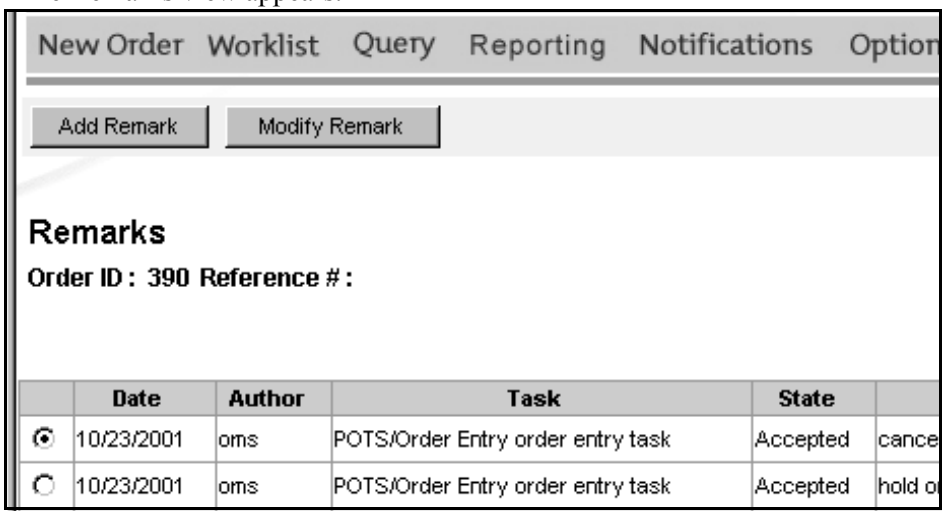
Removing documents from an order

You can remove a document file from an order by using the following procedure.

To remove a document from an order

1. In the Worklist, click the **View Remark(s)** icon beside the appropriate order.

   The Remarks view appears.



2. Select the appropriate remark and click **Modify Remark**.
3. In the **List of Attachments** field on the Modify Remark view, select the appropriate file and click **Remove Attachment**.
4. Click **Done**.

Canceling or redirecting orders

You can cancel an order or redirect it to any task in the same process or any other process in OMS using the Exception function. You can access the Exception function only while in the Worklist and the Query Results views.

Exceptions are defined for the process that the order is in. If there are no exceptions available for a process or you were not assigned the privileges, no exceptions will be available. An exception that cancels or stops an order from continuing displays N/A (not applicable) in the Process and Task columns. When you redirect an order, you can choose an exception that displays the process and task to which it will be redirected.

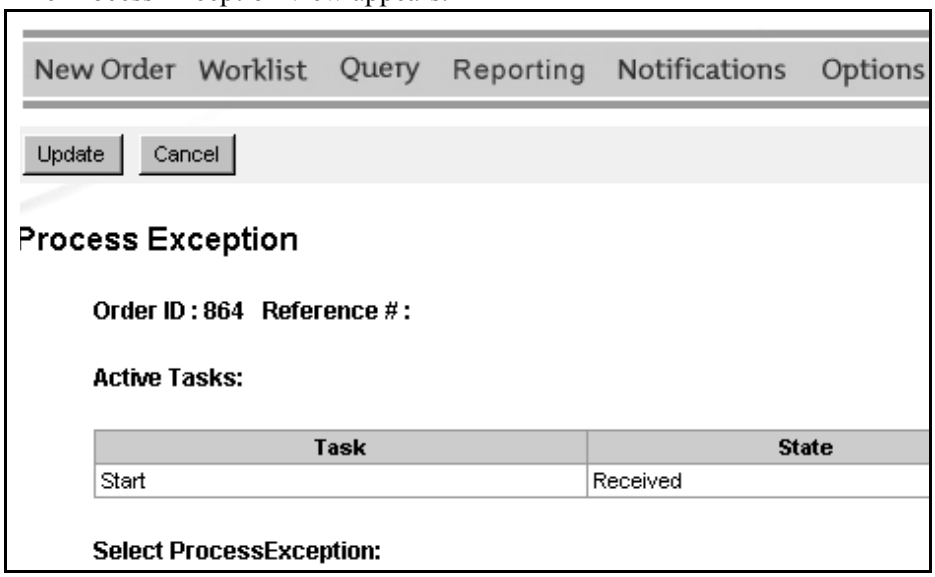
If your System Administrator changes process exceptions in the OMS Administrator while you are working in the Web Client, the changes will only appear in the Web Client the next time you click the refresh icon.

Process exceptions can be created with restrictions that allow only certain, specified workgroups, activities, or order type/sources (or any combination of these) to raise an exception. If you expect an exception to be available, but do not see it, check with your Administrator to ensure the correct restrictions are applied to it.

To cancel or redirect an order

1. In the Worklist, select **Exception** and then select the appropriate order.

   The Process Exception view appears.



2. Select the appropriate process exception and click **Update**.

   The order is redirected or cancelled depending on the status chosen.

You cannot process an exception from an order entry task.

If you try to raise a restricted exception against a process that has subprocesses mapped to it, you will receive a 419, Process exception error message. If this occurs, dismiss the message and notify your system administrator of the conditions under which it occurred.

Managing notifications

Notifications are events that allow the order process or order data to be checked for specific conditions. They are defined by an OMS System Administrator to enable you to be notified by

email when certain conditions occur. For example, users belonging to a specific workgroup may want to be notified that an order's due date is in five days.

When a notification *condition* occurs, it is sent by email to a specific user, or all users belonging to a workgroup. You then acknowledge the notification and, if required, enter the appropriate remarks. If you are not logged on, notifications are held in the queue until you log on.

There are two types of notifications:

- Polled—are based on rules that are evaluated at regular intervals as defined in the OMS Administrator. For example, you may want to be notified each time an order has gone beyond its due date.
- Transitional—are based on rules that are evaluated when an order moves to a specific step, state, status, or exception in a process. For example, you may want to be notified every time an order reaches the billing task

The following table lists the default columns in the Notifications view that display order information You can select these columns through the Preference view.

Table 6: Columns in the Notifications view

Column	Description
Notification Description	A description of the notification as defined in the OMS Administrator.
Notification Type	The type of notification–Polled or Transitional.
Priority	The priority of the notification from 1 to 255 (1 is the highest priority). Priority is available for Polled notifications only.
Notification Timestamp	The date and time of when the notification occurred.
Order Creation Date	The date and time that the order was created.
Expected Order Completion Date	The date and time the order is expected to be completed.
Order ID	The order ID generated by the system when the order is entered.
Source	Where the order originated. For example, client care, fax, etc.
Type	The type of order. For example, facility change, request for new line, etc.
Process	The name of the process.

Table 6: Columns in the Notifications view

Column	Description
Ref. #	An alphanumeric reference associated with the work order.
Process Status	The process status at the time of the notification. For a list of available statuses, see page 3-10.

When you open an order from the Notification view, OMS automatically selects one of the available views assigned to the Workgroup to display the order. For example, if you are assigned to three different workgroups with three different views assigned to each workgroup, then the order is displayed in one of the three views. The default is based on the **Notification Timestamp**.

Acknowledging notifications

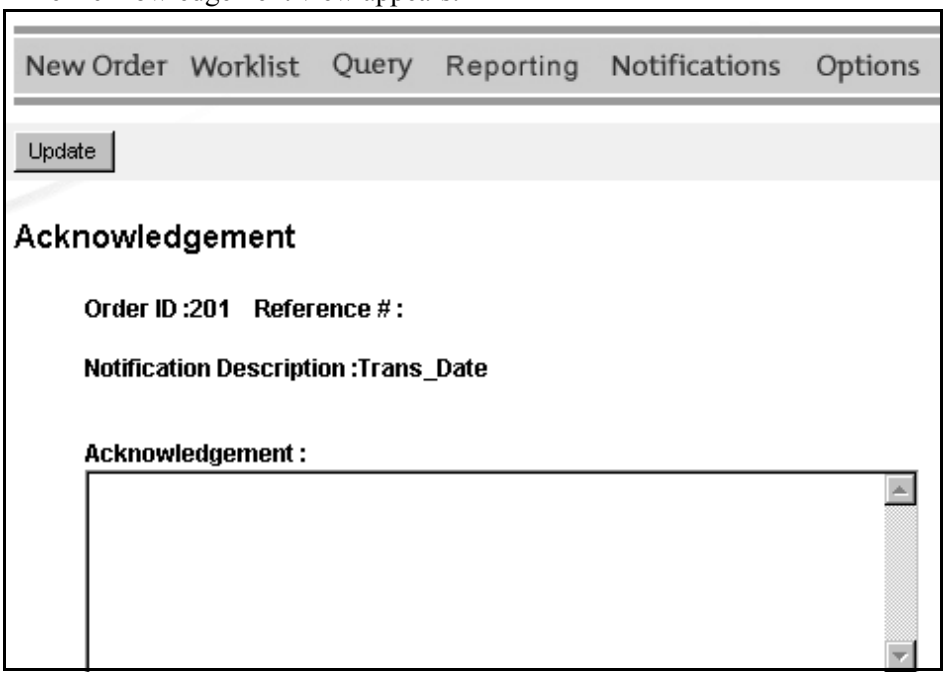
When you acknowledge the notification, OMS clears and resets the notification to continue evaluating at the next chosen time period.

You can acknowledge a notification message by clicking the notification URL in your email message. If you do not receive notification messages by email, see your System Administrator.

To acknowledge a notification

1. In the Notifications view, select **Acknowledgement** and select the appropriate notification.

The Acknowledgement view appears.



2. Enter a message and then click **Update**.

To avoid acknowledging a notification by another user in the workgroup, update your view frequently by clicking the refresh tool.

Adding a message to a notification

You can add a message to a notification only while the Notifications view is selected. After you add and save a message, it cannot be modified or deleted. All users can view the messages that appear in the Acknowledgement(s) view along with the login name, the name of the person entering the remark, the date and time entered, the description, and whether it has been reset or cleared.

To add a notification message

1. In the Notifications view, click **Acknowledgement** and select the notification to which you want to add a message.
2. Type your message in the Acknowledgement view and click **Update**.

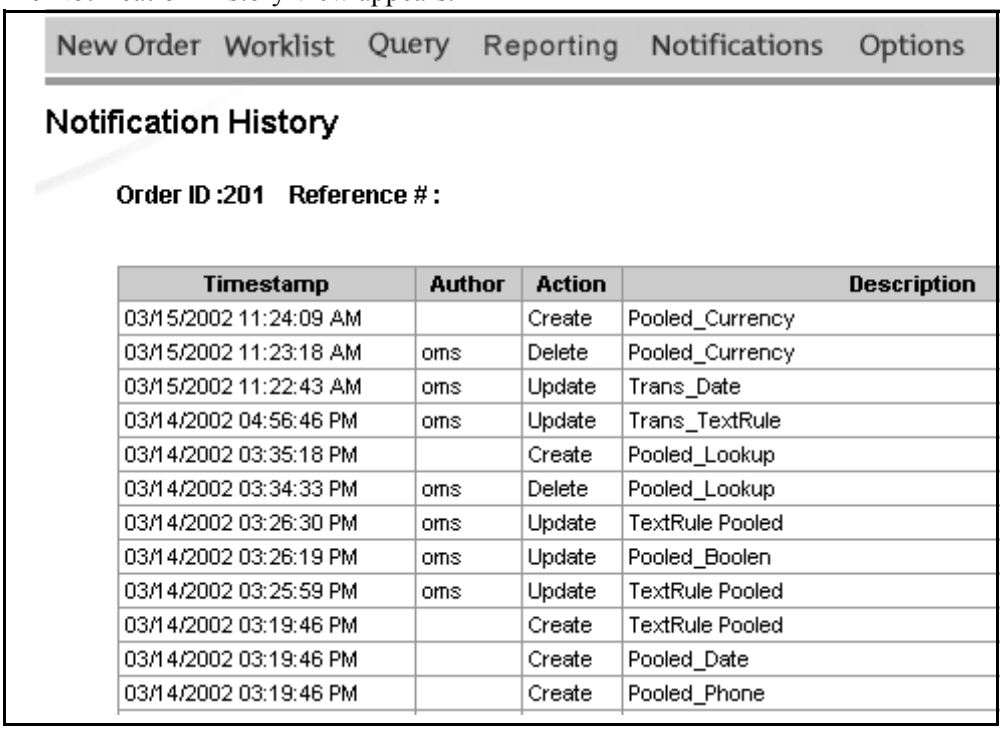
Viewing notification messages

You can view a notification message along with the user who created it, the date it was entered, the notification description, and whether it has been reset or cleared.

To view a notification message

In the Notifications view, select **Notification History** and select the appropriate notification.

The Notification History view appears.



Timestamp	Author	Action	Description
03/15/2002 11:24:09 AM		Create	Pooled_Currency
03/15/2002 11:23:18 AM	oms	Delete	Pooled_Currency
03/15/2002 11:22:43 AM	oms	Update	Trans_Date
03/14/2002 04:56:46 PM	oms	Update	Trans_TextRule
03/14/2002 03:35:18 PM		Create	Pooled_Lookup
03/14/2002 03:34:33 PM	oms	Delete	Pooled_Lookup
03/14/2002 03:26:30 PM	oms	Update	TextRule Pooled
03/14/2002 03:26:19 PM	oms	Update	Pooled_Boolen
03/14/2002 03:25:59 PM	oms	Update	TextRule Pooled
03/14/2002 03:19:46 PM		Create	TextRule Pooled
03/14/2002 03:19:46 PM		Create	Pooled_Date
03/14/2002 03:19:46 PM		Create	Pooled_Phone

Executing a workstream task

To execute a workstream task, the following must be true:

- You must be signed into the OMS Client application.
- You must be a member of the workgroup responsible for processing the workstream.
- Orders must be in a process that was modelled as a workstream by the OMS administrator.

Initiating a workstream task

Use the following procedure to initiate a workstream task.

To initiate a workstream task

1. Select a manual workstream task from the worklist.

   If the first task in the workstream is an automatic task, you do not select it, the system runs it, then—when the automatic task finishes—it takes you to the default order editor (or a custom JSP page that was created for this task) to edit the first manual task in the workstream.

   If the system is executing an automatic or rule task, the system provides an indication that processing is taking place until the next manual task within the workstream is available. When the next manual task becomes available, the task is accepted and displayed in the order editor. While processing is occurring, you can stop the workstream and return to the worklist. Then, when the workstream task becomes available you (or someone else in there workgroup) can pick it up and continue the workstream from that point.

2. Complete the data required for the task.
3. Indicate the task is completed. To do this, click the Finish status..

   This also sets the state for the task (as defined by the OMS administrator). OMS treats task completion through workstream statuses (Next, Previous, Cancel, and Finish) the same way as it treats regular task completion and does ***not*** apply the wizard behavior. For example if you select Previous, the system does not rollback to the previous position in the process. It just completes the task at the Previous status, then takes you to the next task in the Order Editor, according to the defined process flow. By default, OMS does ***not*** rollback any changes made by previous tasks. You can do this, however, by means of a plug-in assigned to the status (Cancel or Previous). If you decide to exit from the workstream, you can always go back to the worklist to continue the workstream. Alternatively, another user in your workgroup can pick up the workstream and begin working on it at a later time.

4. You repeat the steps above until there are no more potential manual tasks in the workstream process. When you complete the final task in the workstream the system returns you to the work-list.

Stopping a workstream task

You can stop a workstream and return to the worklist, by selecting Worklist. After the you do this, any other user in the same workgroup can pick up the next task and begin the workstream again.

Reassigning a workstream

Anyone with assignment rights can re-assign the workstream.

Rolling back a workstream task

The workstream *rollback* feature lets you return the order data to the condition it was in before you entered the current task. Because the rollback executes when the you click the Back button, the order advances according to how your Back button status is defined.

The following example illustrates how the rollback works:

1. OMS moves the workstream process from Task A to Task B.
2. You pick up the order at Task B, make changes to the order-data, then save the changes.
3. You decide to undo the change that you just made while executing Task B, then click the Back button.
4. OMS rolls back the changes you made to the order-data so that it appears as it did just before you entered Task B, then takes you to another task. The task it takes you to depends on how the process that you are working in was designed.

Viewing Orders

This chapter describes the features and functions you can use to query and view orders in detail. The following sections are included:

- Querying orders
- Viewing and filtering orders
- Other order viewing options

Querying orders

You can perform queries and display orders based on specific criteria. You can query for any order in the system including completed orders that are no longer in a process. Sorting is specified by the user.

When you open an order from the Query view, OMS automatically selects one of the views assigned to the Workgroup to display the order. For example, if you are assigned to three different workgroups with three different views assigned to each workgroup, the order is displayed in one of the three views.

When you click Query, the following view appears.

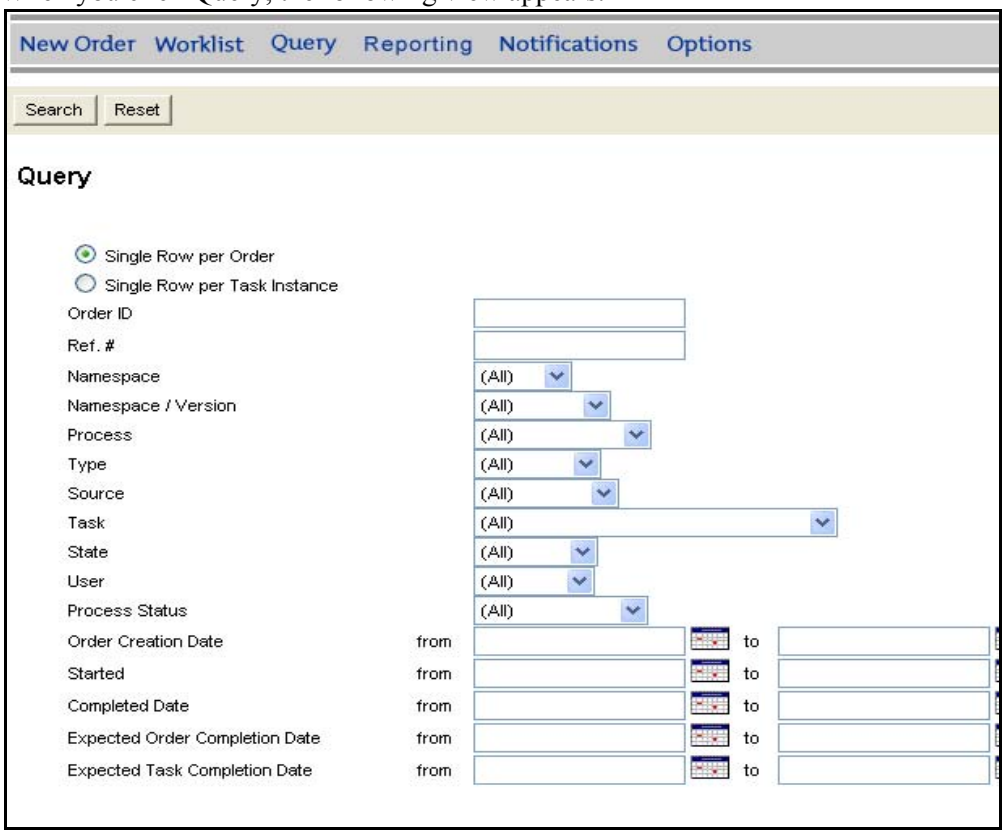


Figure 19: Partial Query view

In some fields, such as the Reference # and Order ID, you can use wildcard symbols to represent any number of unknown characters.

Table 7: Wildcard symbols

To search for:	Type:
Any character or group of characters	*
Any single character	?

Depending on the type of query, you may have more than one match per order. To avoid multiple rows per order, select **Single Row Per Order**. This is automatically selected by default when you open the Query view. If you choose **Single Row Per Task**, only one row is shown for each task instance the order is on.

Querying all orders

The default number of rows you can retrieve for a query is 500. To change the default, see your Systems Administrator.

To query all orders

1. Click **Query**.
2. On the Query view, click **Search**.

Querying by order information

You can query for a specific order by clicking the Query option. You can query on one or all fields, depending on how specific you want your query to be.

To view the list of the columns provided, see ”Displaying, Hiding, and Reordering Columns” on page 2-7.

The Order Details section of the Query view contains the customized columns that have been defined by the System Administrator. You also have the option of querying on these columns that have been defined in the orders.

To query by order information

1. Click **Query**
2. On the Query view, do any of the following:
   - In the **Order ID** field, type the ID of the order.
   - In the **Ref. #** field, type the reference number of the order.
   - From the **Process** list, select the appropriate process.
   - From the **Type** list, select the appropriate order type.
   - From the **Source** list, select the appropriate order source.
   - From the **Task** list, select the appropriate task.
   - From the **State** list, select the appropriate state.
   - From the **User** list, select the appropriate user.
   - From the **Process Status** list, select the appropriate order status.
3. Click **Search**.

   The results of your query are displayed in the Query Results view.

Querying by date

You can narrow your query for an order by choosing a range of creation or completion dates.

To query by date

1. Click **Query**.
2. On the Query view, do any of the following:
   - In the **Order Creation Date** field, choose the appropriate date range.
   - In the **Started** field, choose the appropriate date range**.**
   - In the **Completed Date** field, choose the appropriate date range.
   - In the **Expected Order Completion Date field**, choose the appropriate date range.
   - In the **Expected Task Completion Date** field, choose the appropriate date range.
3. Click **Search**.

   The results of your query are displayed in the Query Results view.

Transitioning orders from the Query Editor

You can transition orders from the Query Editor in the same manner as transitioning orders from the Worklist Editor.

Before starting, ensure that you have an Order View that is defined and associated with a task such as the Task View. If a user is allowed to transit an order, the task view can be displayed in the Query Editor.

Make sure that your Search View is assigned to a workgroup. Tasks need to be accessible to users in the Worklist. In other words, users must have sufficient privileges to transition order from Worklist.

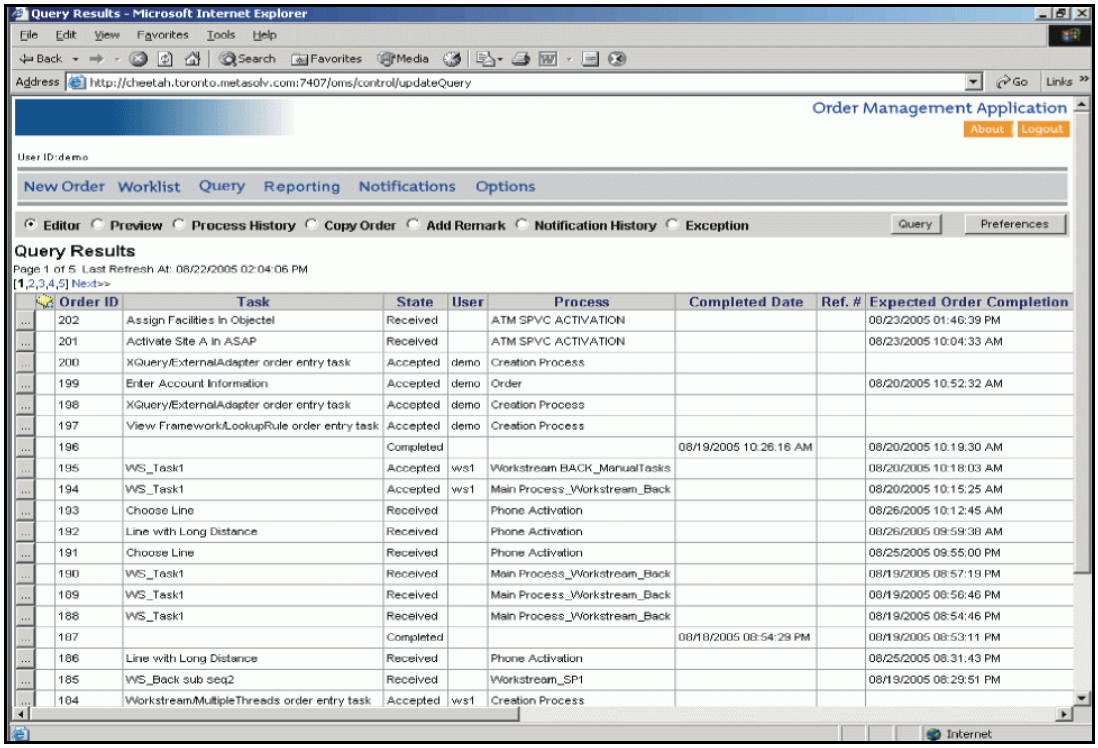
This procedure assumes that the task is accessible from Web Client in the Worklist. Task is in RECEIVED state or ACCEPTED by the same user.

Search View is displayed in the Query Editor for non-transitionable tasks. The preview from the Query Editor always displays the Search View regardless of the type of task (transitionable or non-transitionable).

To transition an order from the Query Editor

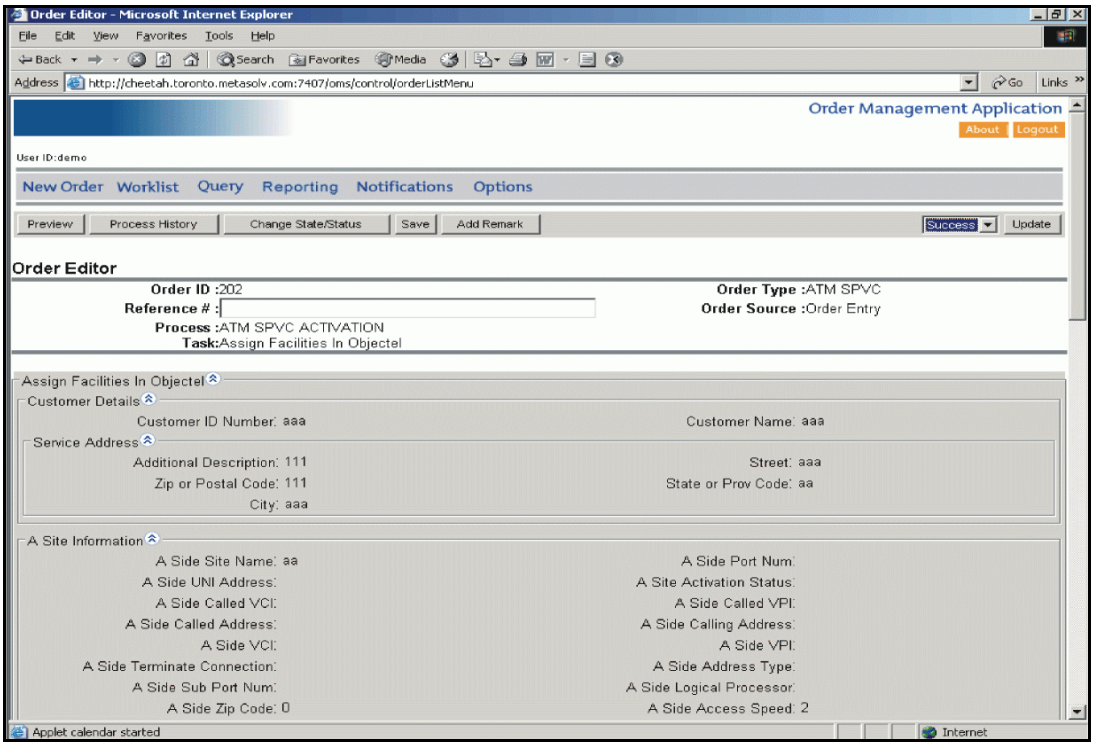
1. From the Query page, search for an order.
2. Open the Query Editor for that order.

When a task is transitionable by the user, order data that is defined in the OMS Administrator is displayed with the Task View.


Query Results - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Address http://cheetah.toronto.metasolv.com:7407/oms/control/updateQuery
Order Management Application
About Logout
User ID: demo
New Order Worklist Query Reporting Notifications Options
Editor Preview Process History Copy Order Add Remark Notification History Exception
Query Preferences
Query Results
Page 1 of 5 Last Refresh At: 08/22/2005 02:04:06 PM
[1,2,3,4,5] Next>>
Order ID | Task | State | User | Process | Completed Date | Ref. # | Expected Order Completion
202 | Assign Facilities In Objectel | Received | | ATM SPVC ACTIVATION | | | 08/23/2005 01:46:39 PM
201 | Activate Site A in ASAP | Received | | ATM SPVC ACTIVATION | | | 08/23/2005 10:04:33 AM
200 | XQuery/ExternalAdapter order entry task | Accepted | demo | Creation Process | | | |
199 | Enter Account Information | Accepted | demo | Order | | | 08/20/2005 10:52:32 AM
198 | XQuery/ExternalAdapter order entry task | Accepted | demo | Creation Process | | | |
197 | View Framework/LookupRule order entry task | Accepted | demo | Creation Process | | | |
196 | | Completed | | | 08/19/2005 10:26:16 AM | | 08/20/2005 10:19:30 AM
195 | WS_Task1 | Accepted | ws1 | Workstream BACK_ManualTasks | | | 08/20/2005 10:18:03 AM
194 | WS_Task1 | Accepted | ws1 | Main Process_Workstream_Back | | | 08/20/2005 10:15:25 AM
193 | Choose Line | Received | | Phone Activation | | | 08/26/2005 10:12:45 AM
192 | Line with Long Distance | Received | | Phone Activation | | | 08/26/2005 09:59:38 AM
191 | Choose Line | Received | | Phone Activation | | | 08/25/2005 09:55:00 PM
190 | WS_Task1 | Received | | Main Process_Workstream_Back | | | 08/19/2005 08:57:19 PM
189 | WS_Task1 | Received | | Main Process_Workstream_Back | | | 08/19/2005 08:56:46 PM
188 | WS_Task1 | Received | | Main Process_Workstream_Back | | | 08/19/2005 08:54:46 PM
187 | | Completed | | | 08/18/2005 08:54:29 PM | | 08/19/2005 08:53:11 PM
186 | Line with Long Distance | Received | | Phone Activation | | | 08/25/2005 08:31:43 PM
185 | WS_Back sub seq2 | Received | | Workstream_SP1 | | | 08/19/2005 08:29:51 PM
184 | Workstream/MultipleThreads order entry task | Accepted | ws1 | Creation Process | | | |
Internet

Orders can be implicitly ACCEPTED by opening Query Editor when order is in a RECEIVED state. This is known as a transitionable task.

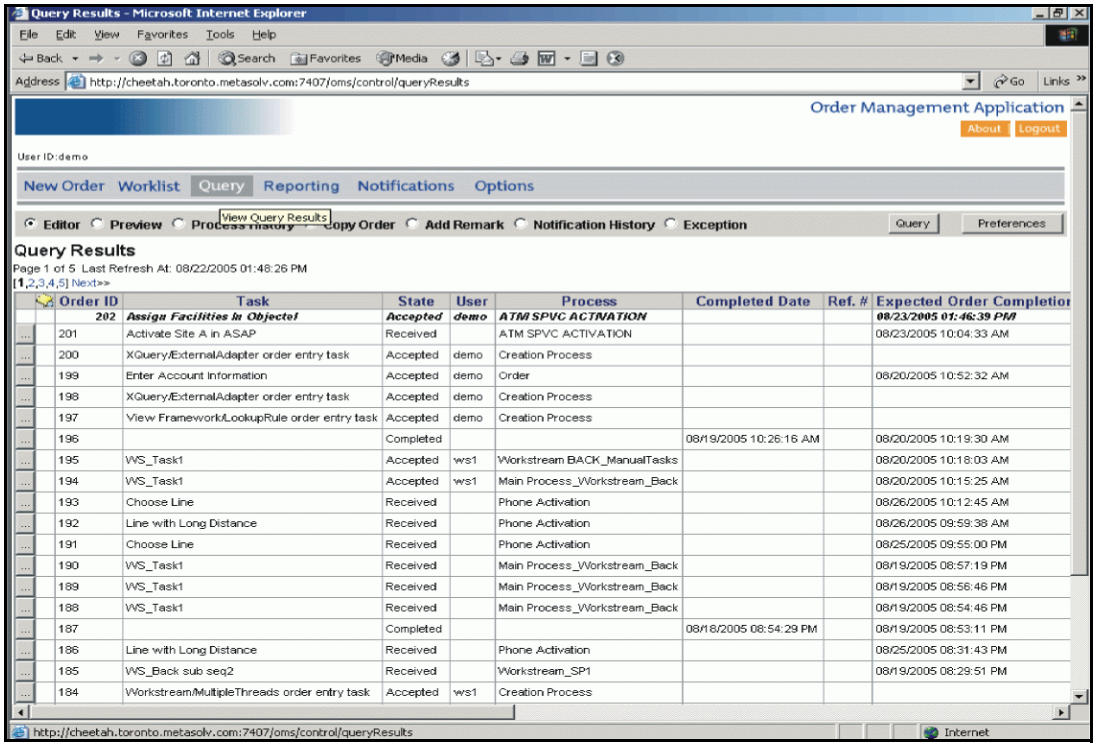
3. Preview the order data using the Query Editor.



The Search View is used when a task is either transitionable or non-transitionable.

If the order is not transitonable, meaning that the order is ASSIGNED to or ACCEPTED by another user, the change task state/status buttons are not available.

4. Using the Query Editor, change the state of the order using the appropriate buttons.


Query Results - Microsoft Internet Explorer
Order Management Application
About
Logout
User ID:demo
New Order
Worklist
Query
Reporting
Notifications
Options
Editor
Preview
Copy Order
Add Remark
Notification History
Exception
Query
Preferences
Query Results
Page 1 of 5 Last Refresh At: 08/22/2005 01:48:26 PM
[1,2,3,4,5] Next>>
Order ID | Task | State | User | Process | Completed Date | Ref. # | Expected Order Completion
202 | Assign Facilities to Object | Accepted | demo | ATM SPVC ACTIVATION | | | 08/23/2005 01:46:39 PM
201 | Activate Site A in ASAP | Received | | ATM SPVC ACTIVATION | | | 08/23/2005 10:04:33 AM
200 | XQuery/ExternalAdapter order entry task | Accepted | demo | Creation Process | | |
199 | Enter Account Information | Accepted | demo | Order | | | 08/20/2005 10:52:32 AM
198 | XQuery/ExternalAdapter order entry task | Accepted | demo | Creation Process | | |
197 | View Framework/LookupRule order entry task | Accepted | demo | Creation Process | | |
196 | | Completed | | | 08/19/2005 10:26:16 AM | | 08/20/2005 10:19:30 AM
195 | WS_Task1 | Accepted | ws1 | Workstream BACK_ManualTasks | | | 08/20/2005 10:18:03 AM
194 | WS_Task1 | Accepted | ws1 | Main Process_Workstream_Back | | | 08/20/2005 10:15:25 AM
193 | Choose Line | Received | | Phone Activation | | | 08/26/2005 10:12:45 AM
192 | Line with Long Distance | Received | | Phone Activation | | | 08/26/2005 09:59:38 AM
191 | Choose Line | Received | | Phone Activation | | | 08/25/2005 09:55:00 PM
190 | WS_Task1 | Received | | Main Process_Workstream_Back | | | 08/19/2005 08:57:19 PM
189 | WS_Task1 | Received | | Main Process_Workstream_Back | | | 08/19/2005 08:56:46 PM
188 | WS_Task1 | Received | | Main Process_Workstream_Back | | | 08/19/2005 08:54:46 PM
187 | | Completed | | | 08/18/2005 08:54:29 PM | | 08/19/2005 08:53:11 PM
186 | Line with Long Distance | Received | | Phone Activation | | | 08/25/2005 08:31:43 PM
185 | WS_Back sub seq2 | Received | | Workstream_SP1 | | | 08/19/2005 08:29:51 PM
184 | Workstream/MultipleThreads order entry task | Accepted | ws1 | Creation Process | | |
Internet

After changing the order state from Query Editor, OMS returns to Query Results page.

5. Run the Query again.

   The order has advanced to the next task in the process.

You have successfully transitioned the order is from the Query Editor. The item is italicized and bolded after the transitions of task state is changed.

The Visual cue is shown whenyou return to the Query Editor. See Order 202.

If you are using the Workstream process and that task is also accessible by the user, that user remains in the Editor after the next task is transitioned.

Filtering order information

You can control the number of orders that appear in the Worklist, by filtering the worklist on one or a number of criteria:

- tasks—the **Task** filter lets you display only orders associated with one or a number of specified task descriptions.

- order states—the **States** filter lets you display just the orders associated with a specific state or states.
- specific fields—the **Field** filter lets you display orders associated with a specified column name and, in some cases, other, specified conditions and values.

  If you are filtering on a flexible-header column when using the Field filter, that column must be associated with your workgroup for you to see it. If you cannot locate a specific flexible-header column on which to filter, notify your OMS Administrator.

  If flexible-header columns are currently being created by the OMS Administrator, you must click the refresh button in the OMS Web Client Worklist to display those columns in the **Field** list.

The following table describes the field filtering options available.

Table 8: Filtering options

Query Option	Description
Field	Contains the default and user-defined columns.
Condition	The Condition option is only available for certain columns in the field list. You have the option of searching for orders equal to a value or between two values: if you choose "=", the Lower Value field is enabled. if you choose "between", both the **Upper Value** and **Lower Value** fields are enabled.
Lower Value	The lower value of the condition for the selected field.
Upper Value	The upper value of the selected field.
States	All available states.
Task	All available tasks.

For text fields and **Order ID** and **Reference #** column headers, you can use wildcard symbols for the **= condition** field to represent any number of unknown characters.

Table 9: Wildcard symbols

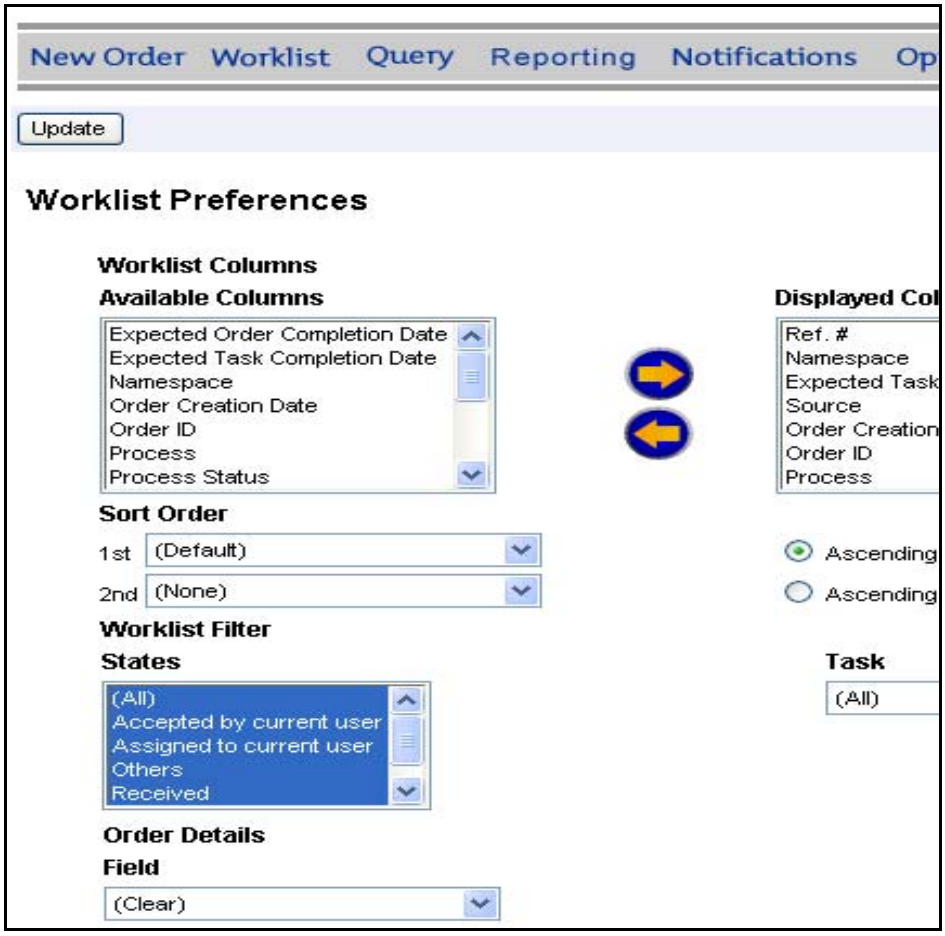
To search for:	Type:
Any character or group of characters	*
Any single character	?

Filtering by task

This procedure describes how to filter the worklist by task.

To filter orders by task

1. In the Worklist, click **Preferences**.



2. From the **Tasks** list on the Worklist Preferences view, select the task or tasks on which you want to filter the worklist, then click **Update**. Only orders associated with those tasks are displayed in the Worklist.

The Tasks list contains a list of all tasks that are available to your workgroup.

If you have a large number of tasks available to your workgroup and need to show orders associated with all but a few of them, instead of making multiple clicks, select the first task displayed in the list, then scroll to the bottom of the list, press and hold the Shift key, then click the last task in the list. This highlights all of the tasks. Next, press and hold the Ctrl key, then click the tasks you wish to remove from the list. This deselects the few, unwanted tasks.

Filtering by state

This procedure describes how to filter the worklist by state.

To filter orders by state

1. In the Worklist, click **Preferences**
2. Choose a state from the **States** list and click **Update**.
3. Only orders associated with that state are displayed in the Worklist. For example, if you choose **Received**, all work orders in the **Received** state are displayed..

To turn the filter off, select All (to display orders associated with all states) from the list.

Filtering by column headers

This procedure describes how to filter the worklist by column headers.

To filter orders by column headers

When you filter on a phone field, you must use number characters only.

1. In the Worklist, click **Preferences**.
2. In the **Field** list of the **Order Details** section, choose the appropriate column name.
3. If the **Condition** list is selected, do one of the following:
   - To specify a value, choose = and type the appropriate lower value in the **Lower Value** field.
   - To specify a range of values, choose **between** and type the appropriate values in the **Lower Value** and **Upper Value** fields.
4. Click **Update**.

Viewing histories

There are two ways for you to view historical data related to processes and orders; Process History and Data History. The Process History view contains the dates, times, and all user information for an order as it goes through the process. Data History lets you view the history of each field in an particular order.

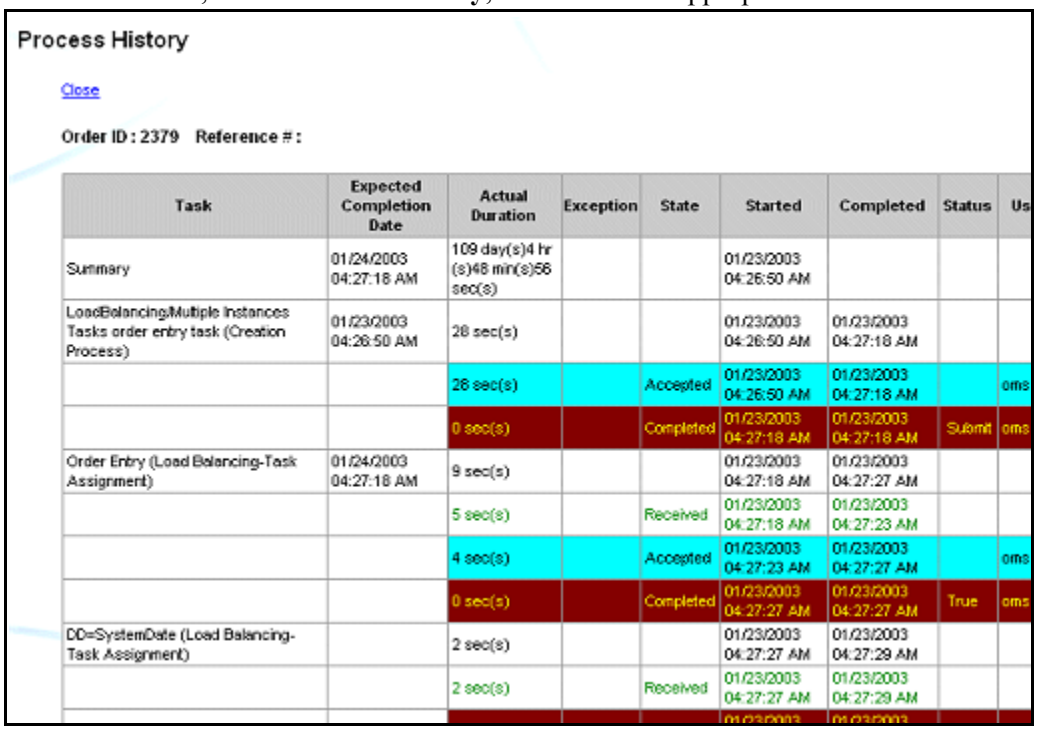
Viewing the Process History

The Process History contains the dates, times, and all user information for an order. You can view the history as a table, pie chart, or Gantt chart.

When you view the Gantt chart, you cannot use the browser's back or forward arrows. To customize the Gantt chart width, height, and property panel, see your System Administrator.

To view the Process History

In the **Worklist**, select **Process History**, then select the appropriate order. .



Process History

Close

Order ID : 2379 Reference # :

Task	Expected Completion Date	Actual Duration	Exception	State	Started	Completed	Status	Us
Summary	01/24/2003 04:27:18 AM	109 day(s)4 hr (s)48 min(s)56 sec(s)			01/23/2003 04:26:50 AM			
LoadBalancingMultiple Instances Tasks order entry task (Creation Process)	01/23/2003 04:26:50 AM	28 sec(s)			01/23/2003 04:26:50 AM	01/23/2003 04:27:18 AM		
		28 sec(s)		Accepted	01/23/2003 04:26:50 AM	01/23/2003 04:27:18 AM		oms
		0 sec(s)		Completed	01/23/2003 04:27:18 AM	01/23/2003 04:27:18 AM	Submit	oms
Order Entry (Load Balancing-Task Assignment)	01/24/2003 04:27:18 AM	9 sec(s)			01/23/2003 04:27:18 AM	01/23/2003 04:27:27 AM		
		5 sec(s)		Received	01/23/2003 04:27:18 AM	01/23/2003 04:27:23 AM		
		4 sec(s)		Accepted	01/23/2003 04:27:23 AM	01/23/2003 04:27:27 AM		oms
		0 sec(s)		Completed	01/23/2003 04:27:27 AM	01/23/2003 04:27:27 AM	True	oms
DD=SystemDate (Load Balancing-Task Assignment)		2 sec(s)			01/23/2003 04:27:27 AM	01/23/2003 04:27:29 AM		
		2 sec(s)		Received	01/23/2003 04:27:27 AM	01/23/2003 04:27:29 AM		

Viewing Data History

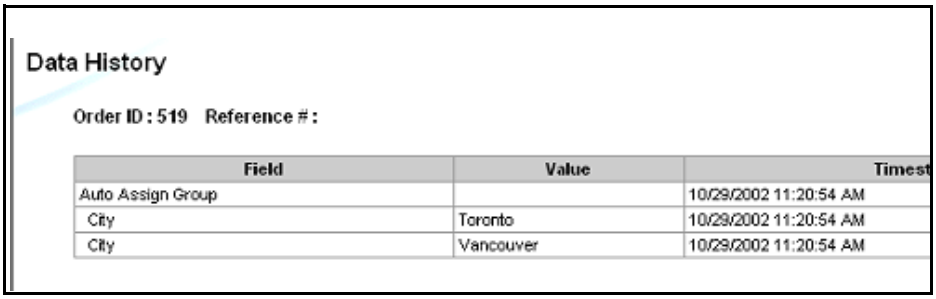
You can view the data history of each field in an order by clicking a link in the Order Editor. Only the fields with data appear as a link underlined in blue text.

To view the data history

1. In the **Worklist** view, select **Editor**, then select the appropriate order.
2. In the Order Editor, click the name of the view link (for example, Initiate Order).

   All fields containing data history appear.

   You can also view the data history of each individual field by clicking the field link, if available.


Data History

Order ID : 519 Reference # :

Field	Value	Timest
Auto Assign Group		10/29/2002 11:20:54 AM
City	Toronto	10/29/2002 11:20:54 AM
City	Vancouver	10/29/2002 11:20:54 AM

Only orders associated with that column header appear in the Worklist.

Other order viewing options

OMS Reporting provides summarized reports on all orders and tasks in OMS. You can view the number of overdue orders, the oldest orders, the most recent orders, the completed tasks for each order, and more.

The order viewing options include viewing pending orders, volume of orders, completed order statistics, and completed task statistics. You can access these viewing options by clicking the Reporting link.

You must be assigned the appropriate user privileges to view the Reports. For more information, contact your System Administrator.

Viewing pending orders

The **Pending Orders** view lists orders waiting to be completed and grouped by the following:

- Responsibility—used to classify the tasks for reporting purposes. For example, certain tasks may be the responsibility of Customer Billing, Accounting, Administration, etc.
- State—a condition or position an order assumes that is related to the status of the task or tasks currently being executed. For example, Received, Completed, and Accepted.
- Task—an activity defined in the context of a process.

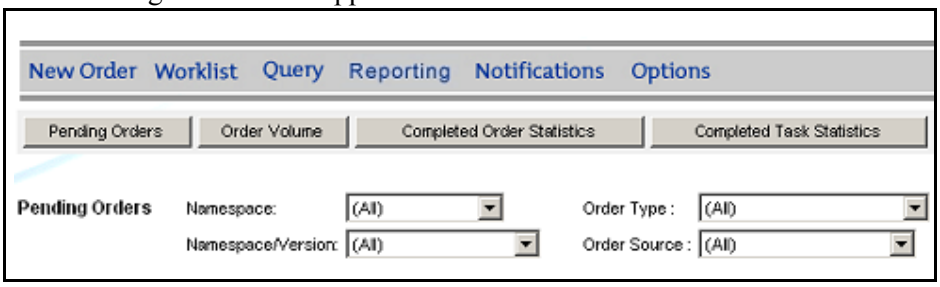
It displays the total number of pending orders, the number of overdue orders, and the oldest or most recent pending orders in OMS.

To limit the orders displayed in the **Orders Pending** view, you can filter the orders by order type and source.

To view pending orders

1. Click **Reporting**.

   The Pending Orders view appears.



2. If you are using namespaces, select the **Namespace**, or **Namespace/Version** as needed.

   Namespace shows all orders containing the specified namespace, while **Namespace/Version** displays all versions within a specific namespace.

3. In the **Order Type** list, choose the appropriate order type.
4. In the **Order Source** list, choose the appropriate order source.
5. From the **Summarized By** list, choose the appropriate level.
6. Click **Find**.

Viewing the volume of orders

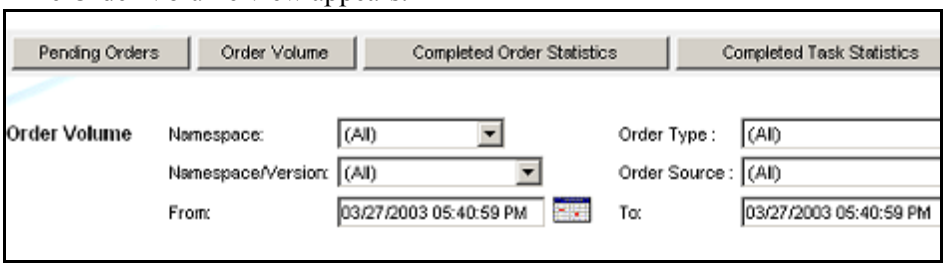
The **Order Volume** view provides a table or chart displaying the number of orders received and completed for a specified time period (such as hour, day, week, or month).

You can filter orders by order type and source, and by choosing a specific time period.

To view order volume

1. Click **Reporting** and then select **Order Volume**.

   The Order Volume view appears.



2. If you are using namespaces, select the **Namespace**, or **Namespace/Version** as needed.

   Namespace shows all orders containing the specified namespace, while **Namespace/Version** displays all versions within a specific namespace.

3. Do one or more of the following:

   - From the **Order Type** list, choose the appropriate order type.
   - From the **Order Source** list, choose the appropriate order source.
   - From the **Unit** list, choose **Hour, Week, Day** or **Month**.
   - From the **Result Format** list, choose whether you want it displayed in a **Table** or **Chart**.
   - From the **From** and the **To** fields, choose the appropriate time range.

4. Click **Find**.

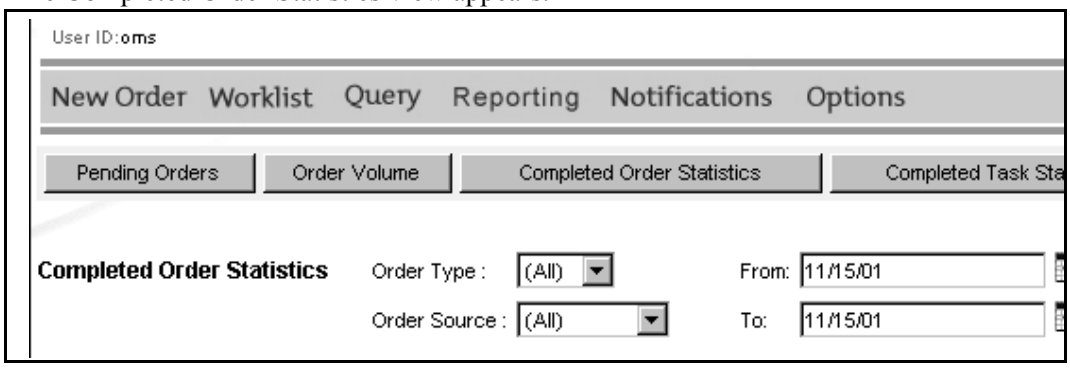
Viewing statistics for completed orders

The Completed Order Statistics view provides information on the duration of orders. You can filter completed orders by the order type and source and by choosing a specific time period.

To view completed order statistics

1. Click **Reporting** and then select **Completed Order Statistics**.

The Completed Order Statistics view appears.



2. If you are using namespaces, select the **Namespace**, or **Namespace/Version** as needed.

   Namespace shows all orders containing the specified namespace, while **Namespace/ Version** displays all versions within a specific namespace.

3. Do one or more of the following:

   - From the **Order Type** list, choose the appropriate order type.
   - From the **Order Source** list, choose the appropriate order source.
   - From the **From** and the **To** fields, choose the appropriate time period.

4. Click **Find**.

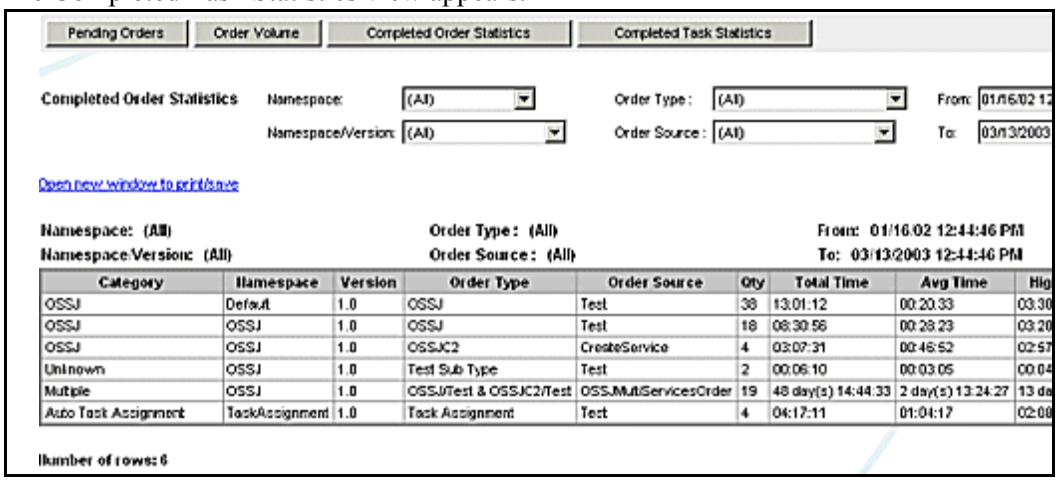
Viewing statistics for completed tasks

The Completed Task Statistics view provides information on the duration of a task. You can filter completed tasks by Responsibility, Task, and by choosing a specific time period.

To view completed task statistics

1. Click **Reporting,** then select **Completed Task Statistics**.

The Completed Task Statistics view appears.


Pending Orders
Order Volume
Completed Order Statistics
Completed Task Statistics
Completed Order Statistics
Namespace: (All)
Order Type: (All)
From: 01/16/02 12
Namespace/Version: (All)
Order Source: (All)
To: 03/13/2003
Open new window to print/save
Namespace: (All)
Order Type: (All)
From: 01/16/02 12:44:46 PM
Namespace/Version: (All)
Order Source: (All)
To: 03/13/2003 12:44:46 PM
Category | Namespace | Version | Order Type | Order Source | Qty | Total Time | Avg Time | Hig
OSSJ | Default | 1.0 | OSSJ | Test | 38 | 13:01:12 | 00:20:33 | 03:30
OSSJ | OSSJ | 1.0 | OSSJ | Test | 18 | 08:30:56 | 00:28:23 | 03:20
OSSJ | OSSJ | 1.0 | OSSJC2 | CreateService | 4 | 03:07:31 | 00:46:52 | 02:57
Unknown | OSSJ | 1.0 | Test Sub Type | Test | 2 | 00:06:10 | 00:03:05 | 00:04
Multiple | OSSJ | 1.0 | OSSJ/Test & OSSJC2/Test | OSSJMultiServicesOrder | 19 | 48 day(s) 14:44:33 | 2 day(s) 13:24:27 | 13 da
Auto Task Assignment | TaskAssignment | 1.0 | Task Assignment | Test | 4 | 04:17:11 | 01:04:17 | 02:08
Number of rows: 6

2. If you are using namespaces, select the **Namespace**, or **Namespace/Version** as needed.

   Namespace shows all orders containing the specified namespace, while **Namespace/Version** displays all versions within a specific namespace.

3. Do one or more of the following:

   - From the **Responsibility** list, choose the appropriate Responsibility.
   - From the **Task** list, choose the appropriate task.
   - From the **From** and the **To** fields, choose the appropriate time frame.

4. Click **Find**.

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